Enterprise Change Management (ECM) Tool User Guide
Version 2.2

Table of Contents

1. High Level Overview

The Enterprise Change Management (ECM) tool is a customized application that was developed using Rational ClearQuest. This tool coupled with the successful implementation of the *Enterprise Change Management Process* is intended to improve coordination and reduce expenses associated with making changes to the FSA software and hardware that resides at the VDC and other data centers.

Specifically, the ECM tool will automate the flow of change requests from inception to implementation. The change request will follow a high level process, and will capture both technical and approval required throughout the process.

1.1 Tool User Group

There are various teams within FSA, VDC, Mod Partner, and non-Mod Partner that are currently using the tool currently. It is anticipated that more teams will begin to use the ECM tool in the near future.

1.2 Rational ClearQuest Overview

FSA selected Rational as the standard tool to use on its projects. FSA has acquired several licenses to encourage use of the different Rational applications. When a need was discovered for a way to track change requests related to the VDC, Rational ClearQuest was selected as the application to use.

ClearQuest is a change request management tool. It can be customized to track change request issues, defects, enhancements, or all of the above. It stores the records in a database and presents the records either through a full capability client or a scaled down web-based application. This user guide will focus on version 2.0 of the ClearQuest web application.

1.3 ECM Tool General Information

URL (from EDLAN and other direct connections): http://www.fsatool.ed.gov

URL from trusted VPN's: https://4.20.15.228/cqweb. Be sure you are using your VPN's proxy server in order to be allowed to access this web site. If you are still having problems getting to the web site, contact an administrator (see Section 10).

Current Version: Rational ClearQuest 2002.05.00 is currently installed at the VDC.
Schema Repository Database: Oracle8i Release 8.1.5
Record Database: Oracle8i Release 8.1.5

2. Record Types

The ECM tool has two record types: change requests and enhancements. Users will have the ability to enter either a change request or suggested enhancements into the ECM tool. The two record types are detailed in this section.

2.1 Change Requests

A change request is a request for any change to the VDC or other data center that alters system configuration or environment of an established baseline, whether an upgrade, modification or addition to hardware, software, firmware, application, network or infrastructure.

2.2 Enhancements

This record type will be used to record any enhancement suggestions for the ECM tool.

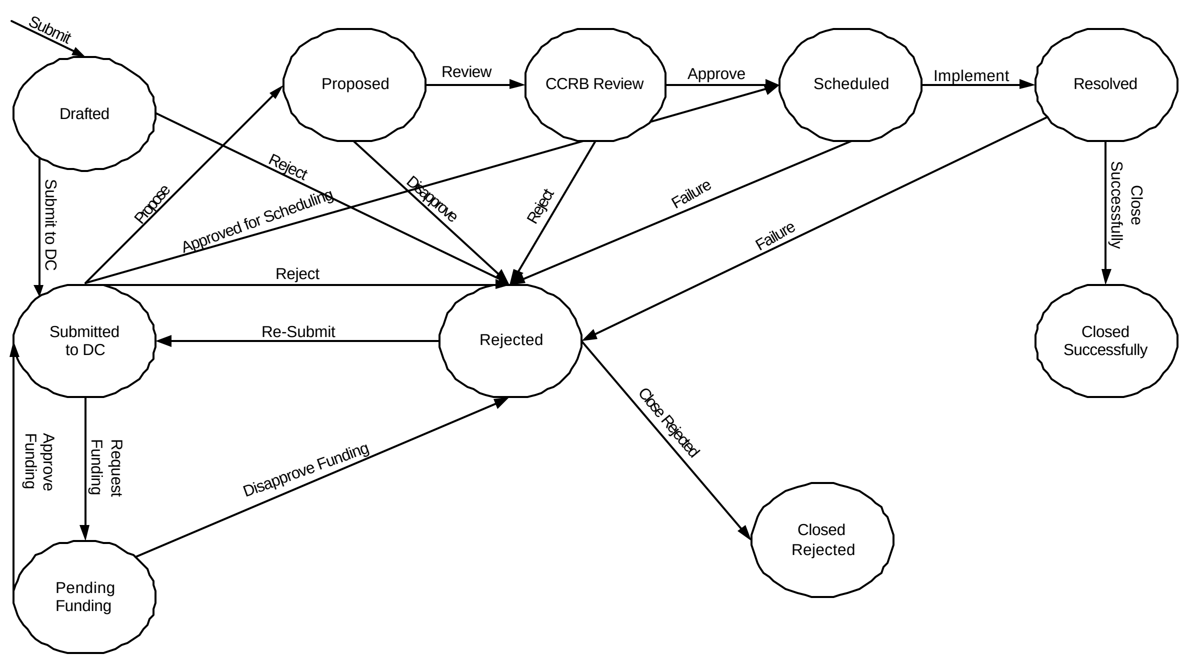
3. Process Flow

ClearQuest uses **states** and **actions** to depict the life cycle of **change requests** or **issues**. The **state** of a change request or issue indicates its current status. An **action** represents the activities that can take place to move the record from one state to another. Taken together, actions and states represent the various life cycles or process flows a record can go through. The process flow for the two Enterprise Change Management record types, change requests and enhancements, is depicted in the State Transition Matrix drawings in the following sections.

3.1 Change Request Process Flow

States:
Drafted
Submitted to DC
Proposed
Pending Funding
CCRB Review
Scheduled
Rejected
Resolved
Closed Successfully
Closed Unsuccessfully
Funding Approved

Actions:
Submit
Submit to DC
Propose
Re-Submit
Request Funding
Approve Funding
Review
Disapprove
Approve
Close Rejected
Implement
Failure
Close Successfully
Reject
Disapprove Funding
Approved for Scheduling

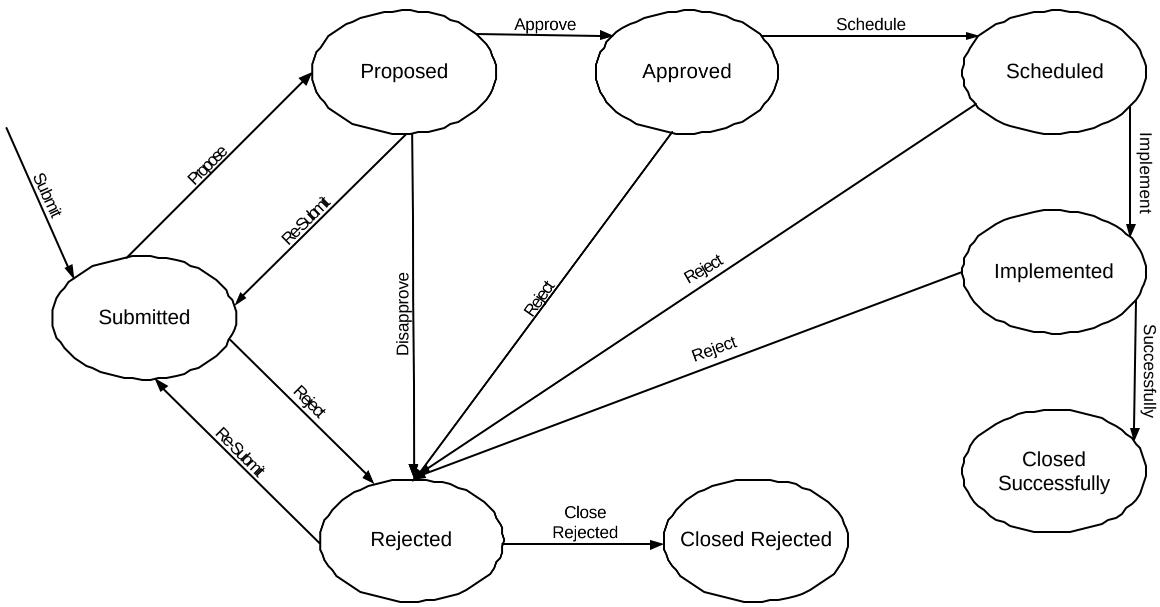


Change Request State Transition Matrix

3.2 Enhancements Process Flow

States:
Submitted
Proposed
Approved
Scheduled
Implemented
Rejected
Closed Successfully
Closed Rejected

Actions:
Submit
Propose
Approve
Schedule
Implement
Reject
Close Successfully
Close Rejected
Disapprove
Re-Submit

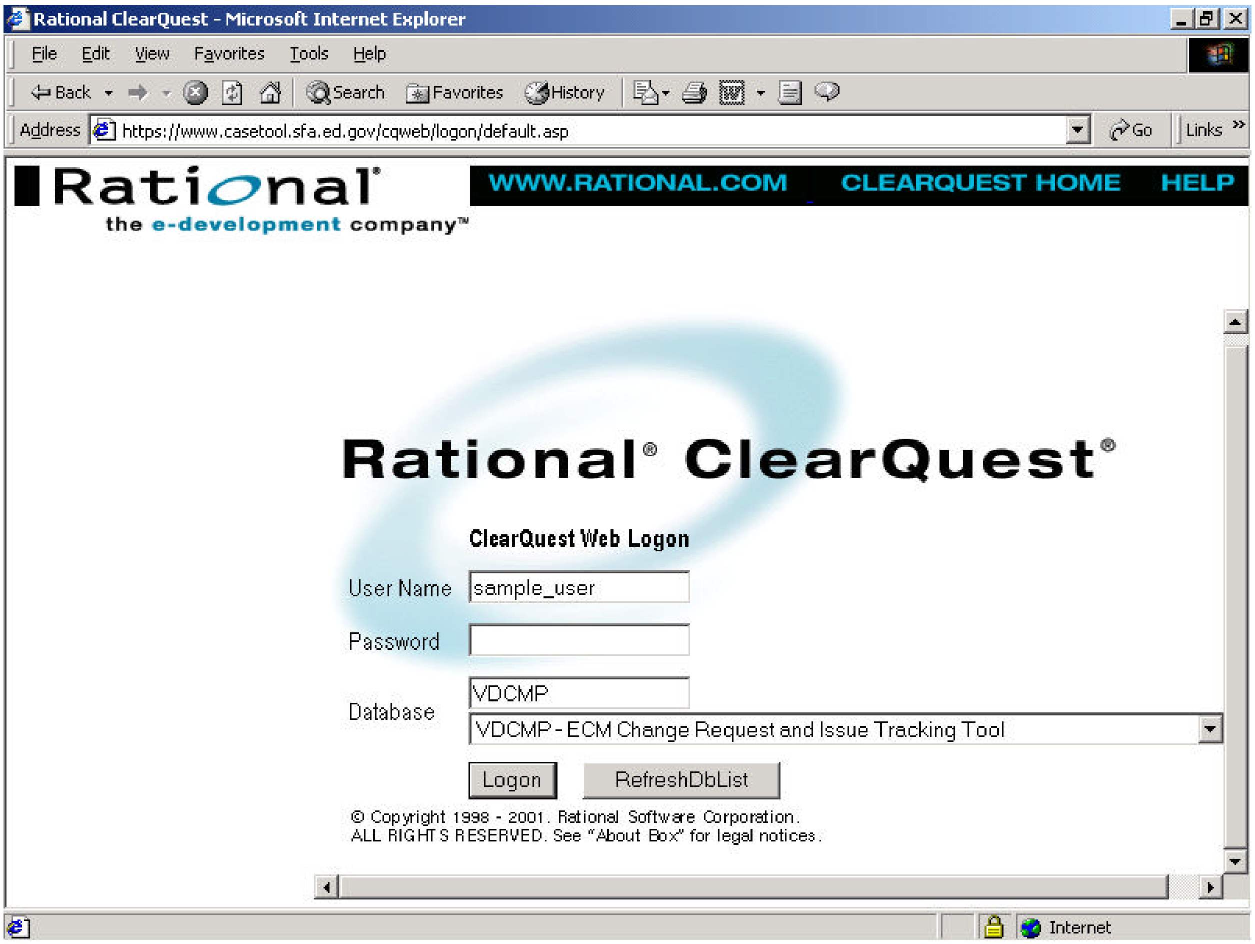


Enhancements State Transition Matrix

4. Using the Enterprise Change Management ClearQuest Schema – Change Request Form Record Type

This section will detail how to do the basic functionality offered in the Enterprise Change Management ClearQuest tool. It includes screen shots and instructions for the web client. For information about using the desktop client, please contact the Enterprise Change Management administrator.

4.1 Login



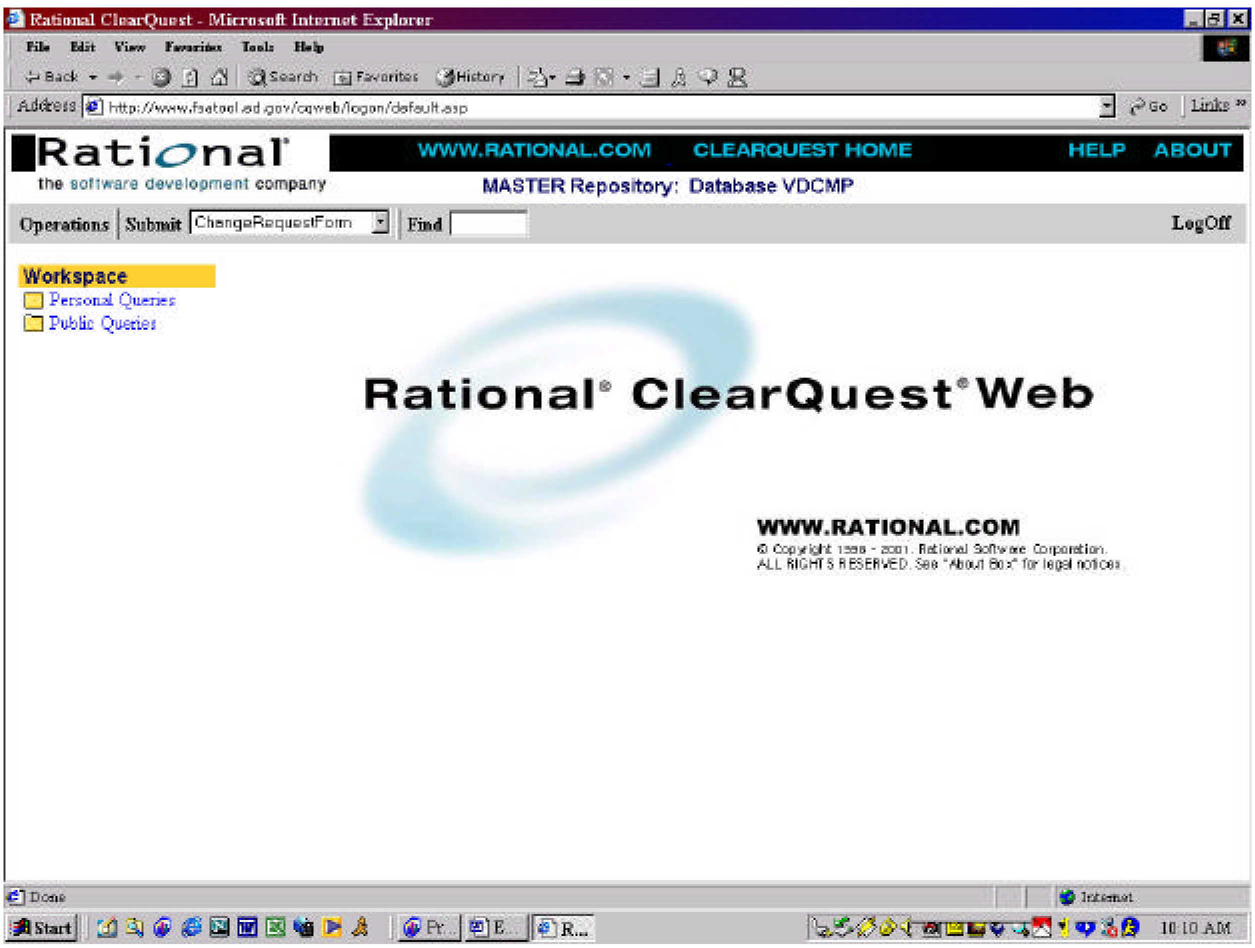
The screen shot above is the login screen and is required to gain access to a ClearQuest schema. The URL for this page is http://www.fsatool.ed.gov if you are on the ACN and ED LANs or https://4.20.15.228/cqweb/ if you are on a trusted network accessing the Rational server on the VDC.

The following steps are required to log into the web client:

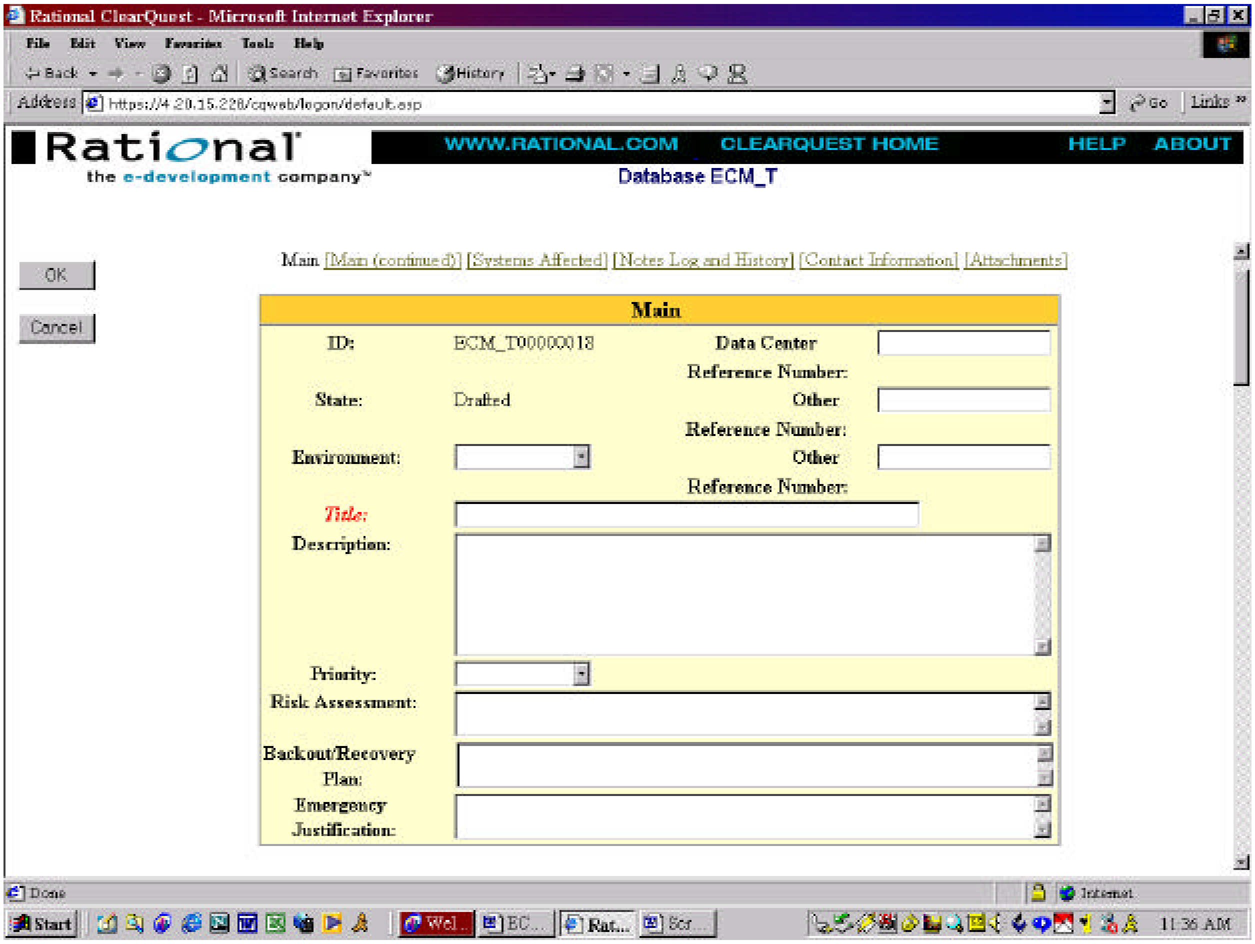
1. Type your user name into the 'User Name' text field.
2. Type your password into the 'Password' text field.
3. Select the proper database using the drop-down selection widow.
4. Click the 'Logon' button.
5. If you have entered the wrong password or selected the wrong database, click the RefreshDbList button or the 'Logon Again' button. Then repeat steps 1 – 4.

4.2 Drafting a Change Request

Once you have properly logged in, you will gain access to the desired schema. To enter a new change request, you will need to click the 'Submit' link in the horizontal menu bar that is shown in the screen shot below. Make sure 'ChangeRequestForm' is selected in the drop-down list next to 'Submit'. This will allow you to create a draft change request to the database. This draft version of the change request can be used among the individual application teams prior to the submission to the data center.



When drafting a change request, the 'Title', 'Requester's Name/Phone' and 'Requester's Email' are required fields, signified by the RED label.



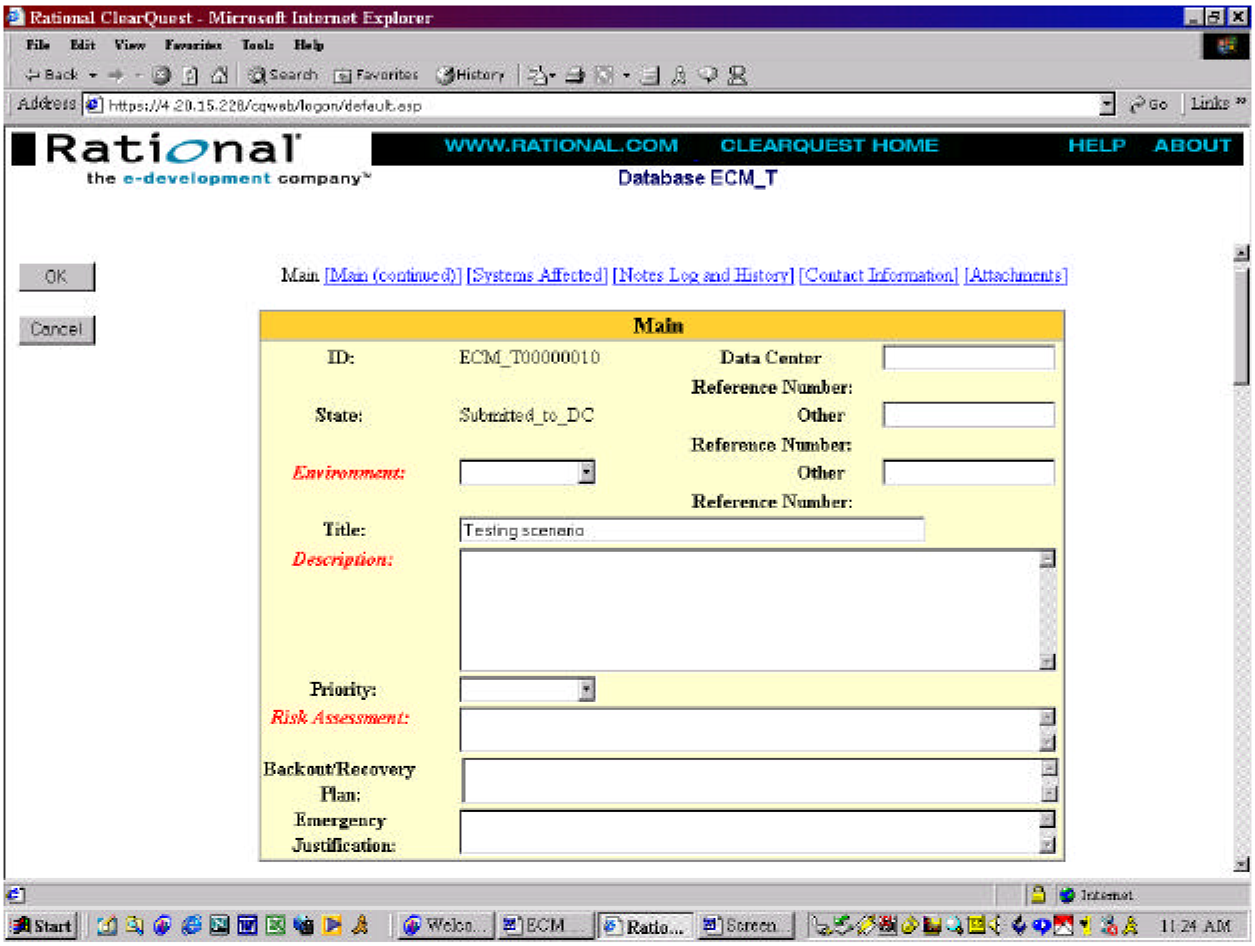
4.3 Submitting a new Change Request

The following fields are mandatory in order to successfully submit a change request to the Data Center (their label will be RED on the form):

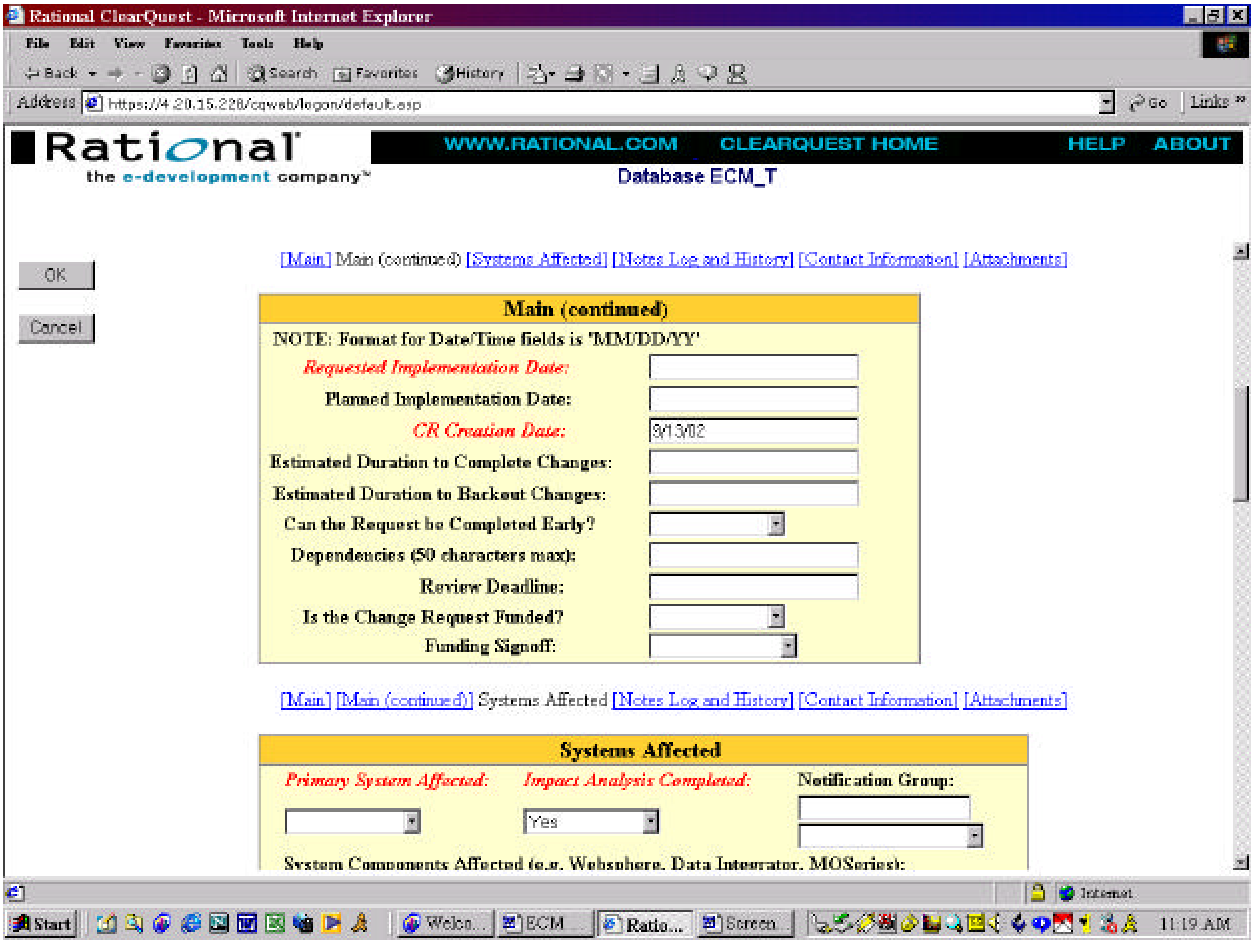
- Environment
- Description
- Risk Assessment
- CR Creation Date
- Requested Implementation Date
- Primary System Affected
- Impact Analysis Completed
- Requester's Name/Phone
- Requester's Email

The ChangeRequestForm record type has several sections: the "Main" tab, the 'Systems Affected' tab, the 'Notes Log and History' tab, the 'Contact Information' tab and the 'Attachments' tab.

Main Tab – Initial Submission Screen

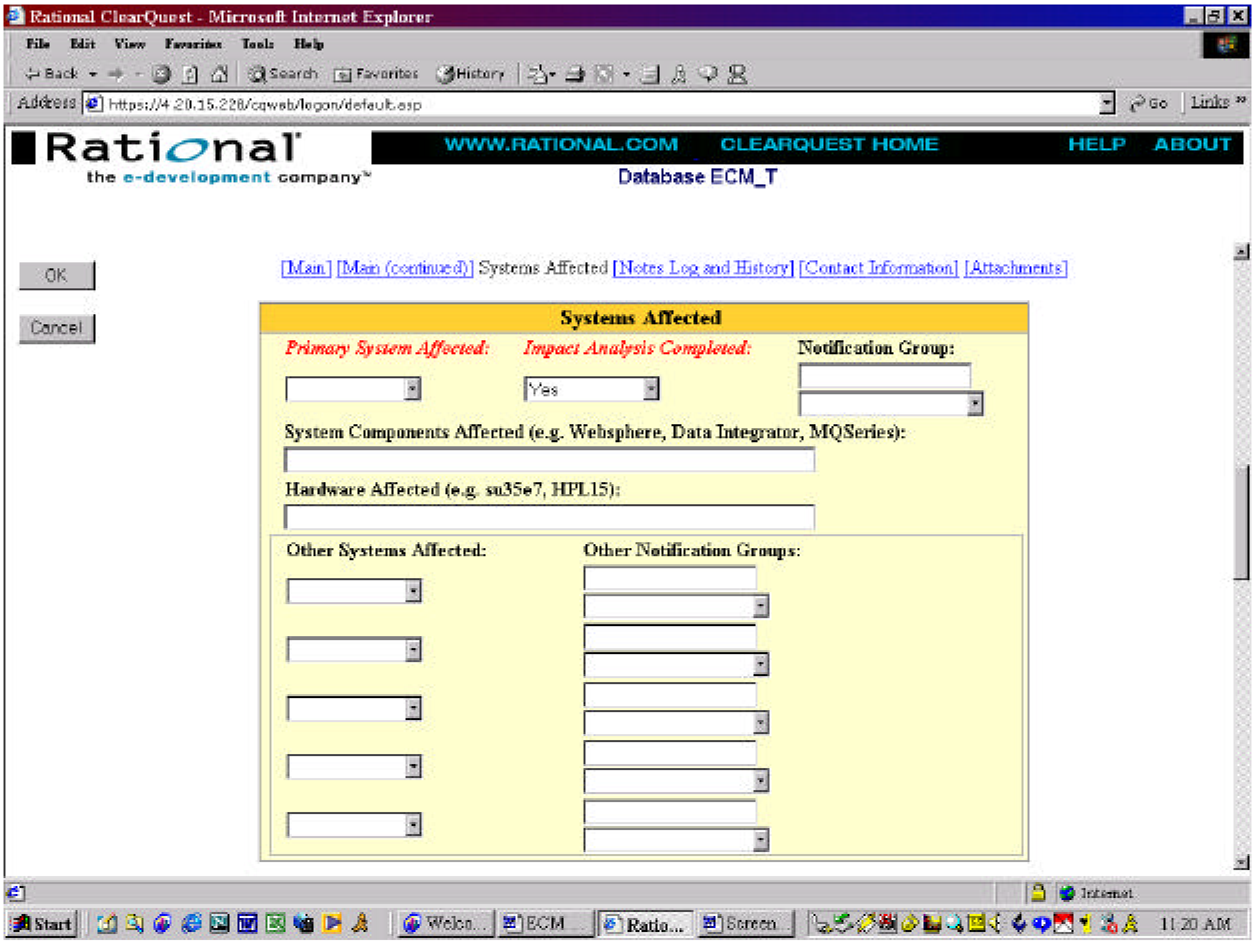


The 'Main' tab will allow the user to enter pertinent information about the concerning issues. On the Main tab, you will notice that 'ID' and 'State' are already pre-populated. The user can enter information into the 'Data Center Reference Number', and 'Other Reference Number' fields. The Environment field will determine if the change request is for development or production. The 'Title' field will already be populated from the 'Drafted' state. The 'Description' field will allow the user to detail the existing concerns that may exist. The 'Priority' field will allow the user to determine the level of importance for the change request. The 'Risk Assessment', 'Backup/Recovery Plan' and ' 'Emergency Justification' fields are available to allow the user to provide additional information.



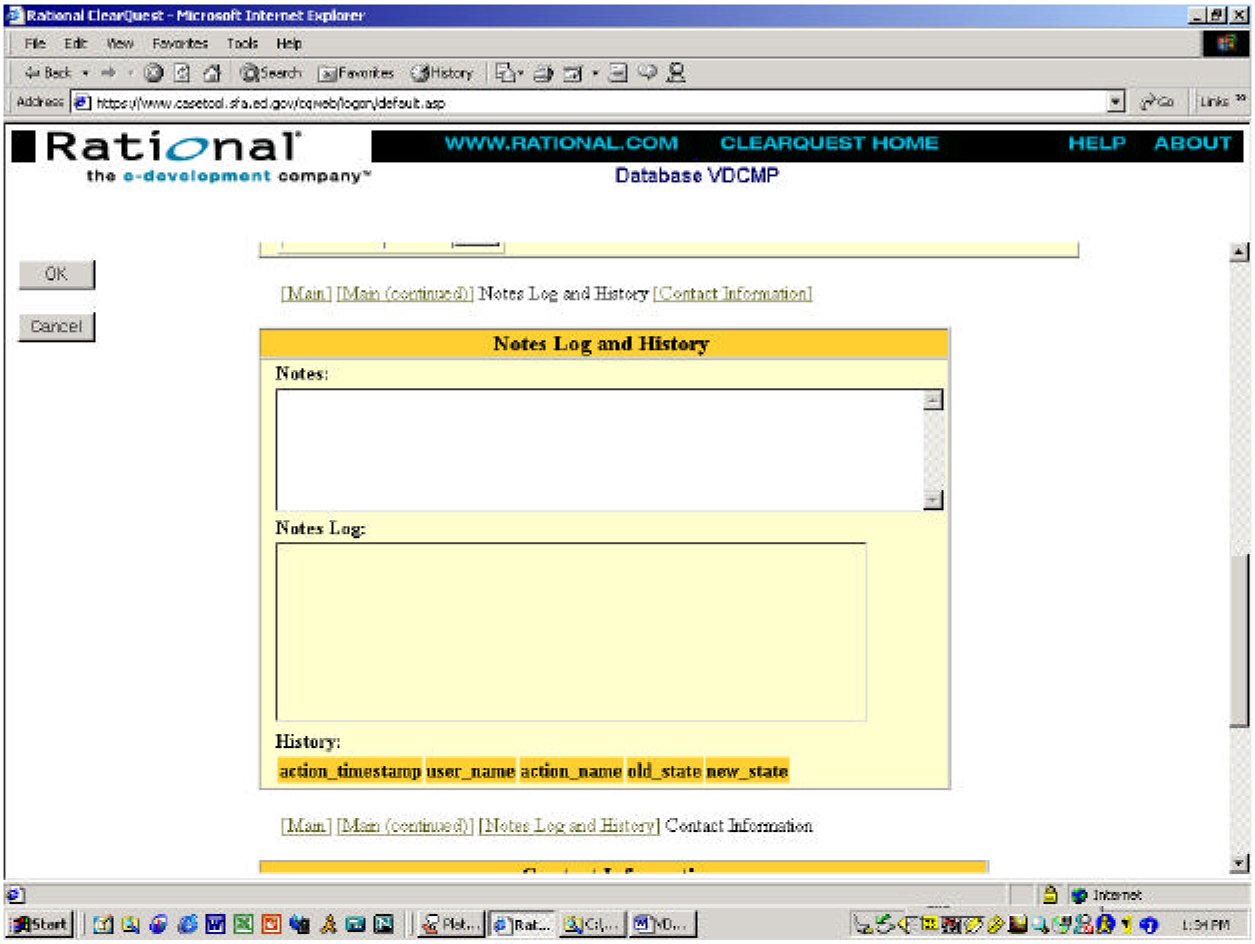
The 'Main (continued)' tab allows the user to provide more information about the change request. The 'CR Creation Date' field is automatically pre-populated. The remaining fields on this tab will give a time-specific overview of the change request, the impact of the change request, and the funding issues of the change request.

Systems Affected Tab



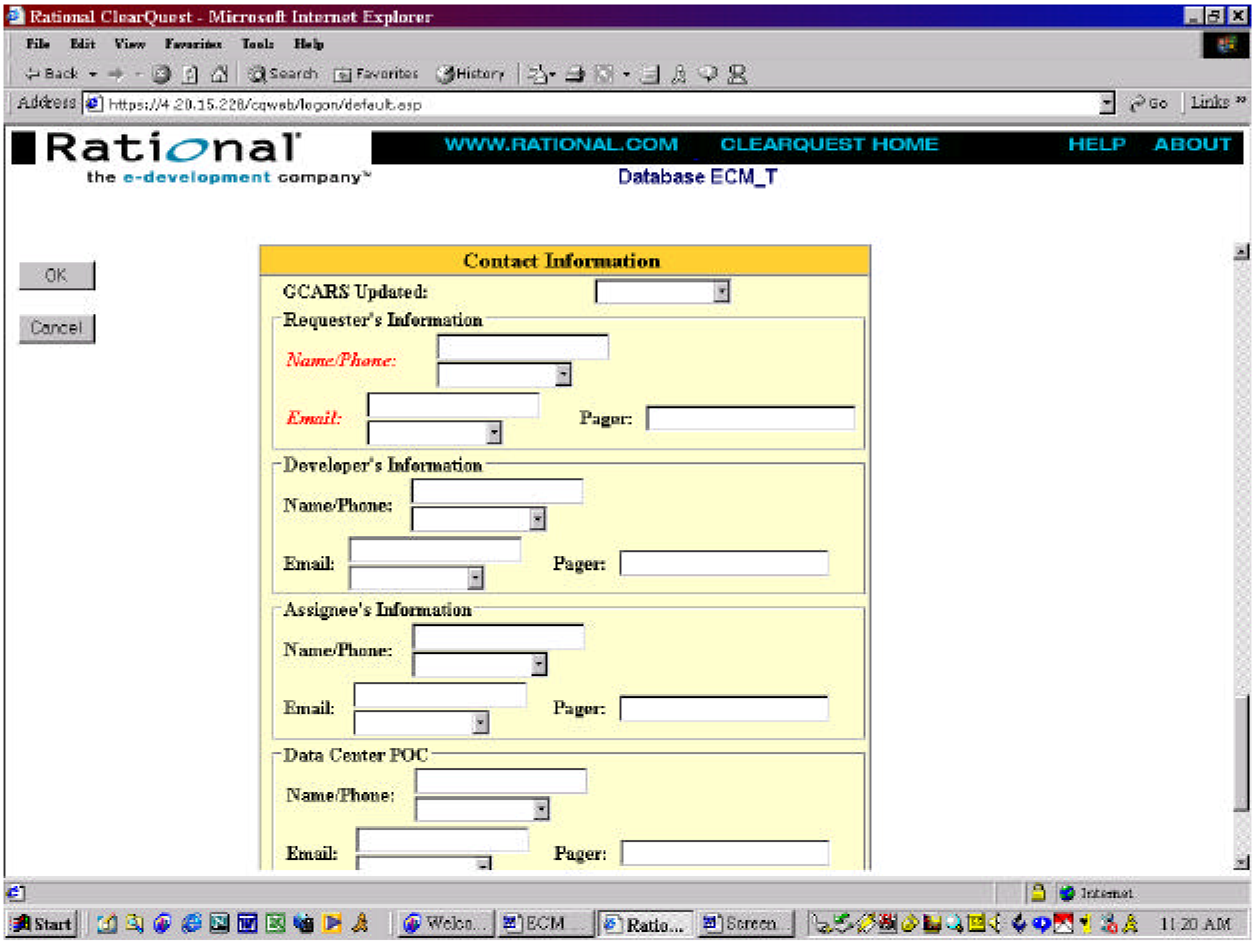
The 'Systems Affected' tab will allow the user to select up to 6 different systems that are affected by the change request. The 'Impact Analysis Complete' field will verify if the impact analysis has been completed. This will be a required field if the user selects the 'Prod.' option in the 'Environment' tab. The impact analysis must be attached to the change request. The 'Notification Group' fields will automatically be populated based on the systems selected. Although this tab can contain a great detail of information, only the 'Primary System Affected' field is mandatory, but the user should enter as much information as possible to avoid future delays. 'All Systems' is an option for the system affected fields, but should only be used if the change request truly affects each system.

Notes Log and History Tab



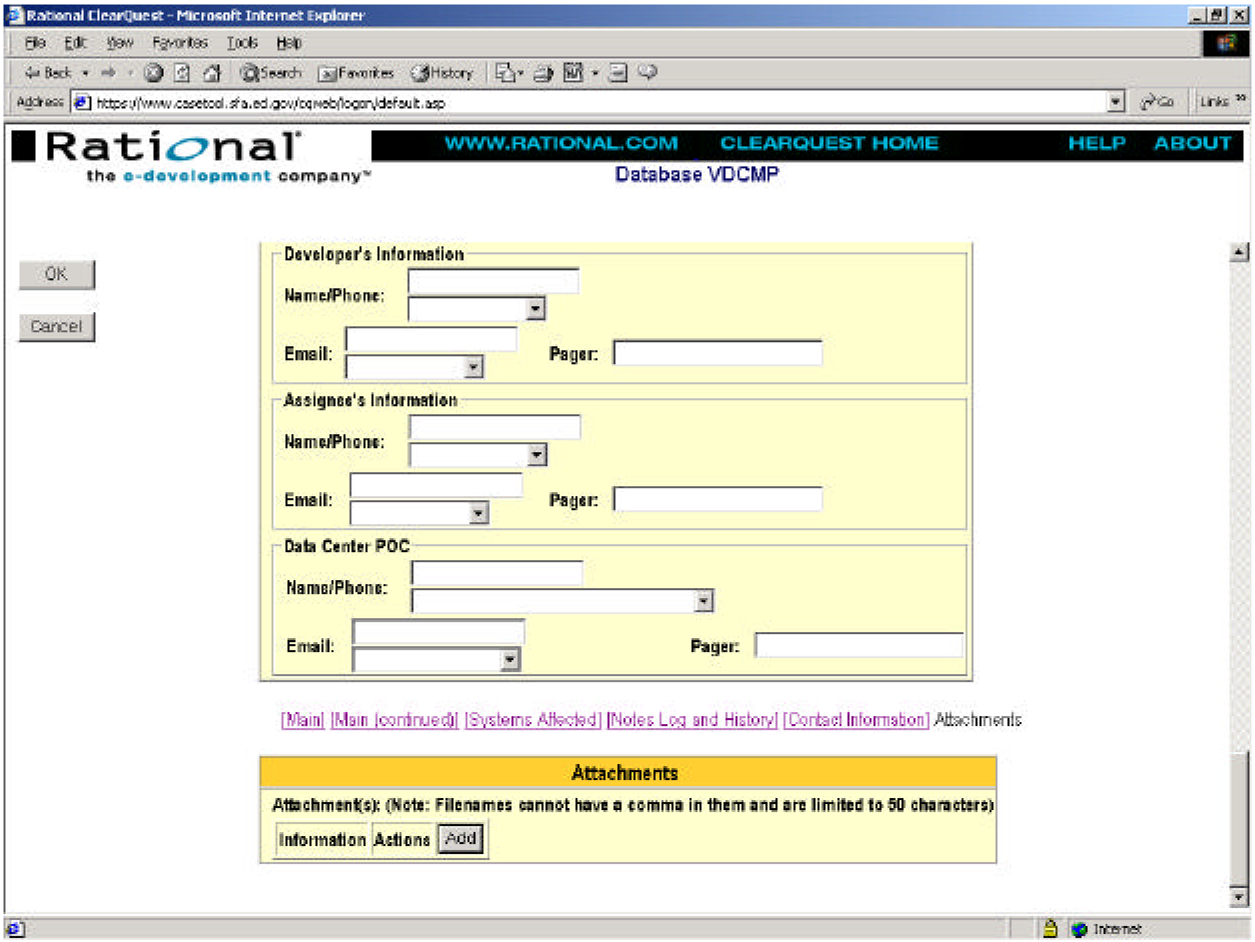
The ‘Notes Log and History’ tab will allow the user to describe the change request, review other notes about the change request, and see when the changes occurred. Each time a change request has changed states, the ‘History’ field will automatically capture the pertinent information.

Contact Information Tab



The ‘Contact Information’ tab allows the user to determine if the ECM record has been updated by GCARS. It also contains the requester, the developer, the assignee, and the data center point of contact information. Only the requester’s name/phone and email are required for submission.

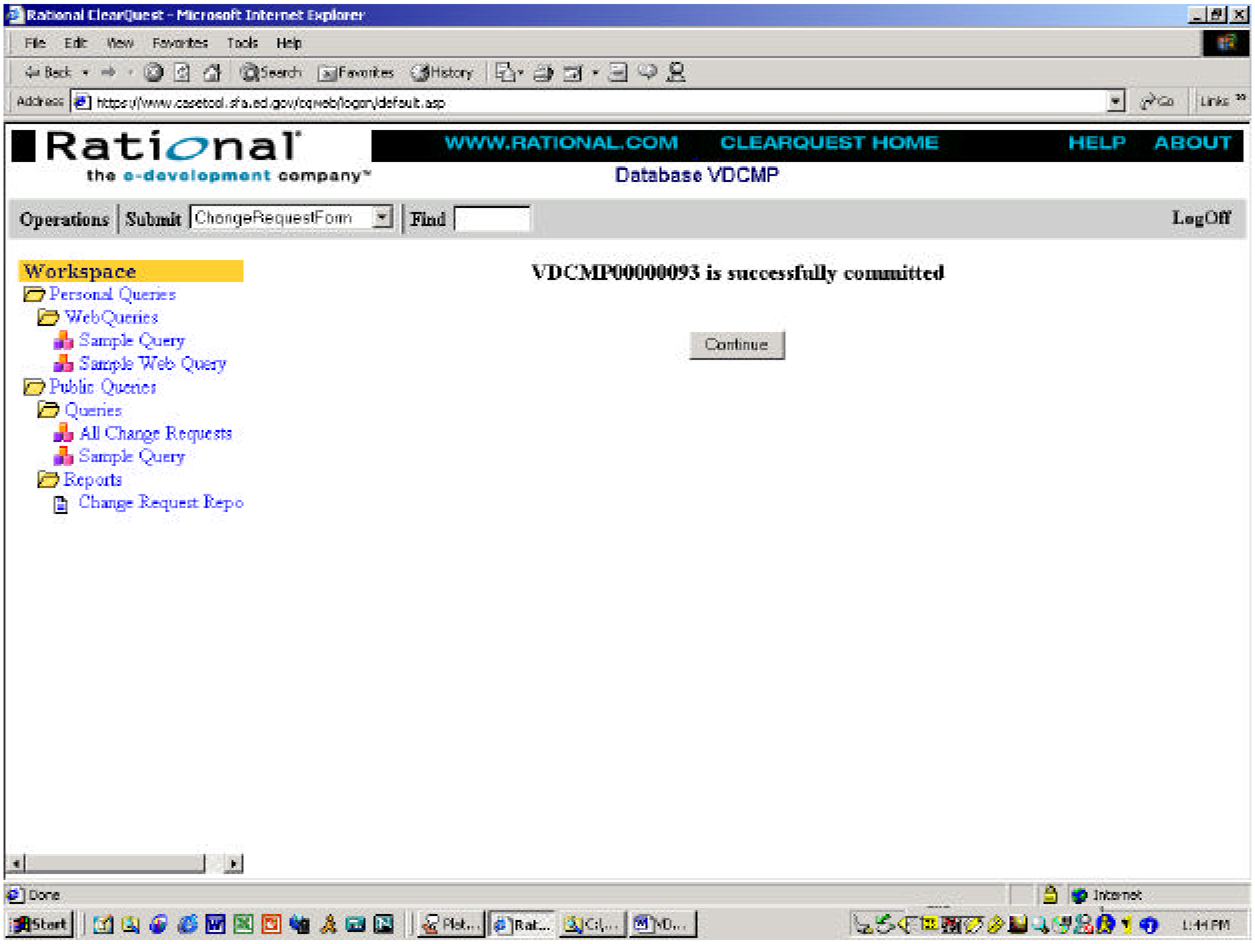
Attachments Tab



Attachments may be added to a change request by clicking the 'Add' button at the bottom of the screen on the 'Attachments Tab'. If the Impact Analysis is required (production change requests only), it should be attached to the change request.

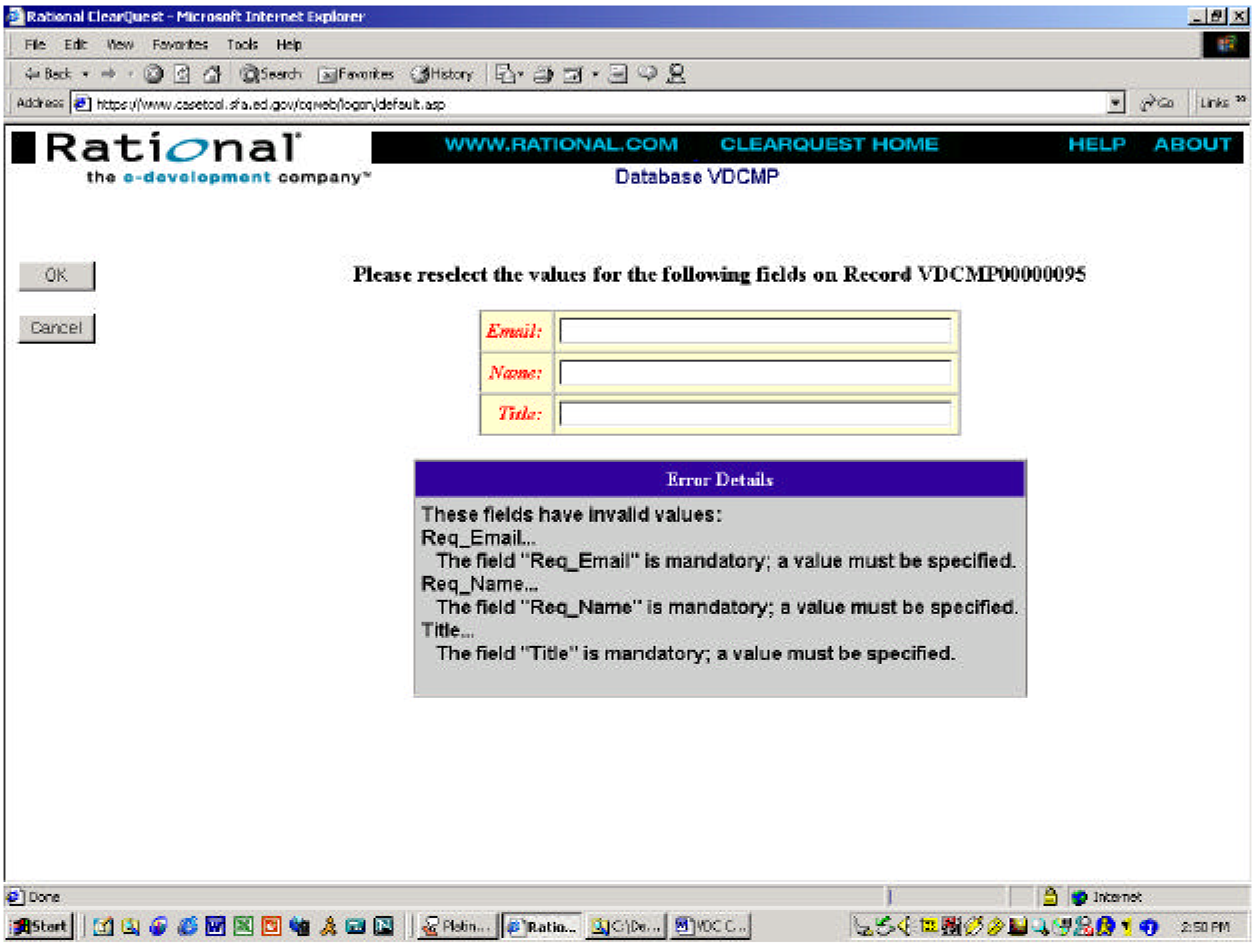
To complete the submit process, the user should click on the 'OK' button.

Successful Submission Page



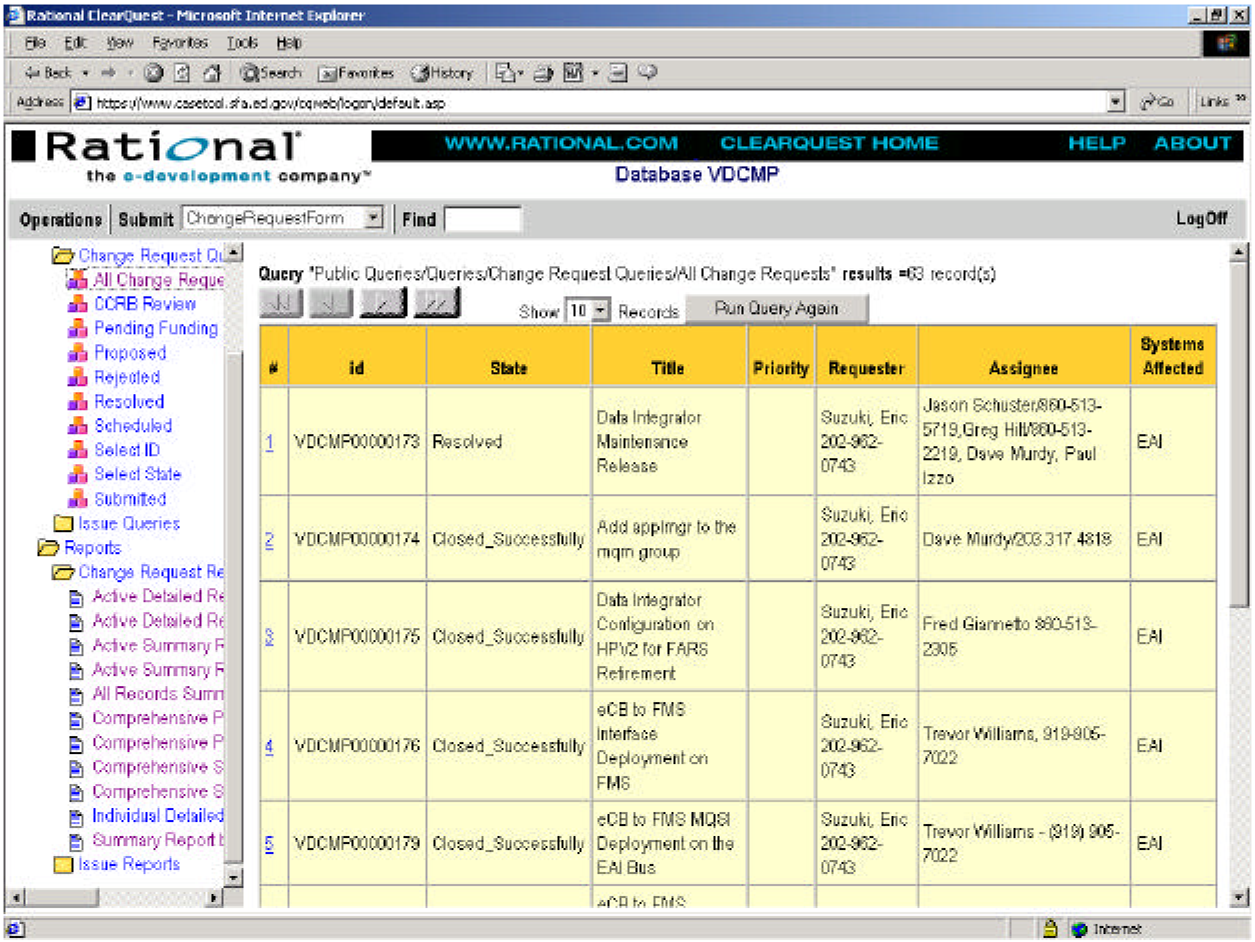
Once the change request has been submitted, the user will receive a confirmation page stating that the request was successfully committed to the database.

Error Page



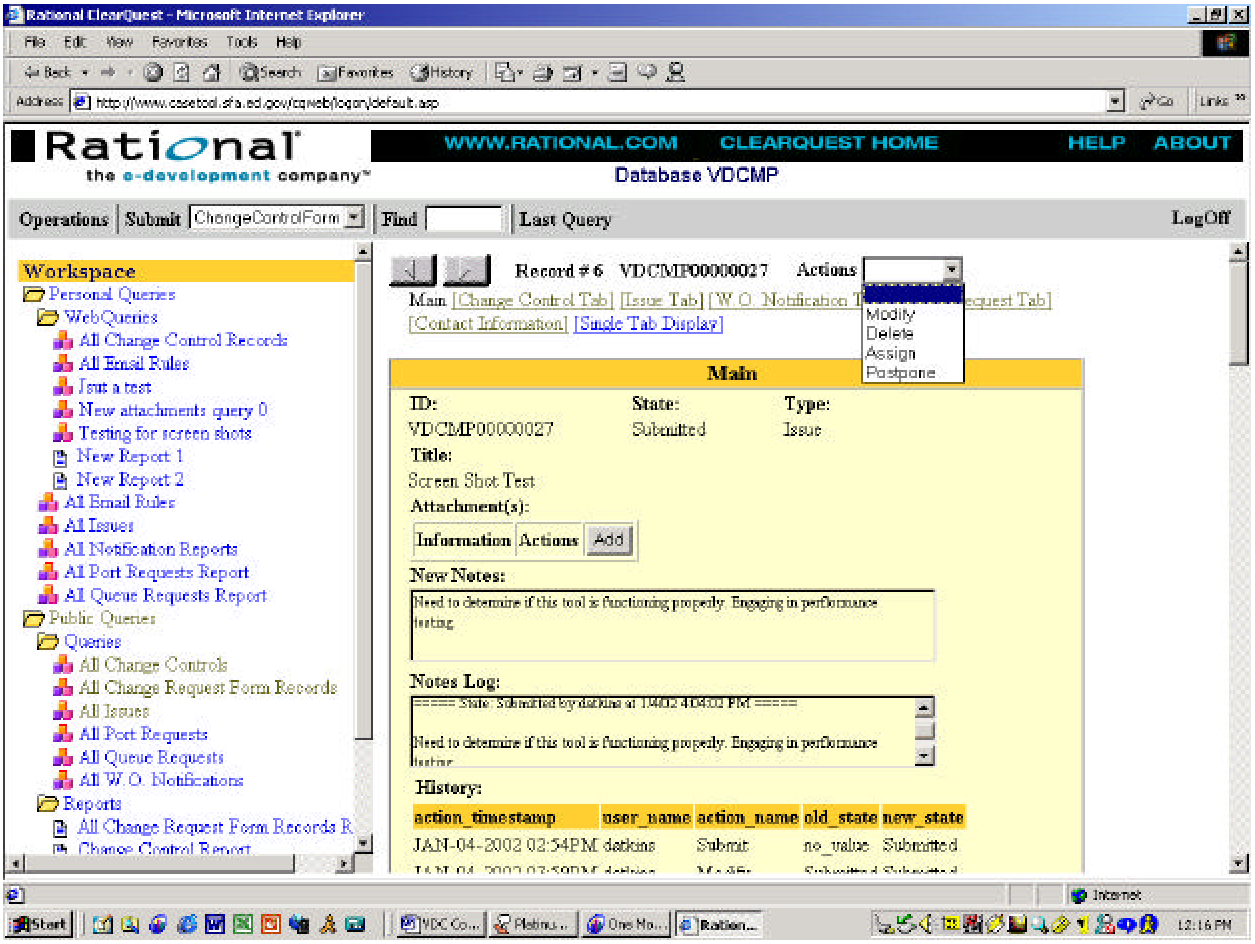
An error page will be displayed if the required fields are left blank. The above page is an example of all the required fields left blank.

4.4 Modifying an Existing Change Request



In order to edit a change request that has been previously submitted, the user will have to select an existing query from the 'Public Queries' – 'Queries' folder or select a query created in the personal folder. The above is an example screen shot of the 'All Change Requests' in the 'Public Queries' – 'Queries' – 'Change Request Queries' folder.

The user will have to click the numbered hyper link, located in the column labeled '#', in order to gain access to a particular change request. Keep in mind the number (hyperlink) in the '#' column is just a placeholder for the query and has no connection to the change request. For example, over time, the change record that is #3 in the query results may not stay #3. Use the 'id' to refer to the record.



Assuming that Record #6 was selected from the previous page, the page above will be displayed. As shown, the 'Actions' selection window will allow the user to select different actions to run on the change request.

Initially the change record will be displayed as read-only. However, if the user selects 'Modify', or any other available choice other than 'Delete', as the desired action, changes can be made within the text fields.

**Note: Refer to section 3.1 to see the Change Request Process Flow for section 4.4 – 4.14.

4.5 Drafted State

A change request moves to the 'Drafted' state after being submitted by the user making the change request. This will allow the user's immediate team to have time to internally approve the change request before submitting the change request to the data center. From the 'Drafted' state, the change request can move to the 'Submitted to DC' state or the 'Rejected' state.

4.6 Submitted to DC State

A change request moves to the 'Submitted to DC' state after being 'submitted to dc' from the 'Drafted' state, having funding approved from the 'Pending Funding' state, or being re-submitted from the 'Rejected' state. From the 'Submitted' state, the change request can move to the 'Rejected' state, the 'Pending Funding' state, the 'Scheduled' state, or the 'Proposed' state depending on the user's permissions. The required fields for this state were mentioned in Section 4.2.

4.7 Proposed State

A change request moves to the 'Proposed' state after being proposed from the 'Submitted to DC' state. From the 'Proposed' state, the change request can move to the 'CCRB Review' state or the 'Rejected' state depending on the user's permissions.

'Title' becomes read-only when going to this and all subsequent states. The only way to alter the title is to run the 'Modify' action.

In addition to the fields required to submit a record, the following fields must be filled in with valid information in order to go to this state:

- Review Deadline
- Is the Change Request Funded?
- Funding Signoff

4.8 Rejected State

A change request moves to the 'Rejected' state after being rejected from the 'Drafted', 'Submitted to DC' and 'CCRB Review' states, disapproved from the 'Proposed' and 'Pending Funding' states, or failing from the 'Scheduled' and 'Resolved' states. From the 'Rejected' state, the change request can move back to the 'Submitted' state if the change request was re-submitted or to the 'Closed Rejected' state if the change request has been closed depending on the user's permissions.

4.9 Pending Funding State

A change request moves to the 'Pending Funding' state from the 'Submitted' state if funding is needed. Once funding is approved and attained, the change request can move back to the 'Submitted' state or move to the 'Rejected' state if funding is disapproved and the user has proper permissions.

All previously required fields must remain filled in to successfully advance to this state.

4.10 CCRB Review State

A change request moves to the 'CCRB Review' state after being reviewed from the 'Proposed' state. From the 'Approved' state, the change request can move to the 'Scheduled' state or the 'Rejected' state depending on the user's permissions.

All previously required fields must remain filled in to successfully advance to this state.

4.11 Scheduled State

A change request moves to the 'Scheduled' state after being approved from the 'CCRB Review' state or approved for scheduling from the 'Submitted' state. From the 'Scheduled' state, the change request can move to the 'Resolved' state or to the 'Rejected' state depending on the user's permissions.

In addition to the fields required to submit a record, the following fields must be filled in with valid information in order to go to this state:

- Planned Implementation Date
- Assignee's Name/Phone
- Assignee's Email

4.12 Resolved State

A change request moves to the 'Resolved' state after being implemented from the 'Scheduled' state. From the 'Resolved' state, the change request can move to the 'Closed Successfully' state or to the 'Rejected' state depending on the user's permissions.

All previously required fields must remain filled in to successfully advance to this state.

4.13 Successfully Closed State

A change request moves to the 'Closed Successfully ' state after being successfully closed from the 'Resolved' state.

All previously required fields must remain filled in to successfully advance to this state.

4.14 Closed Rejected State

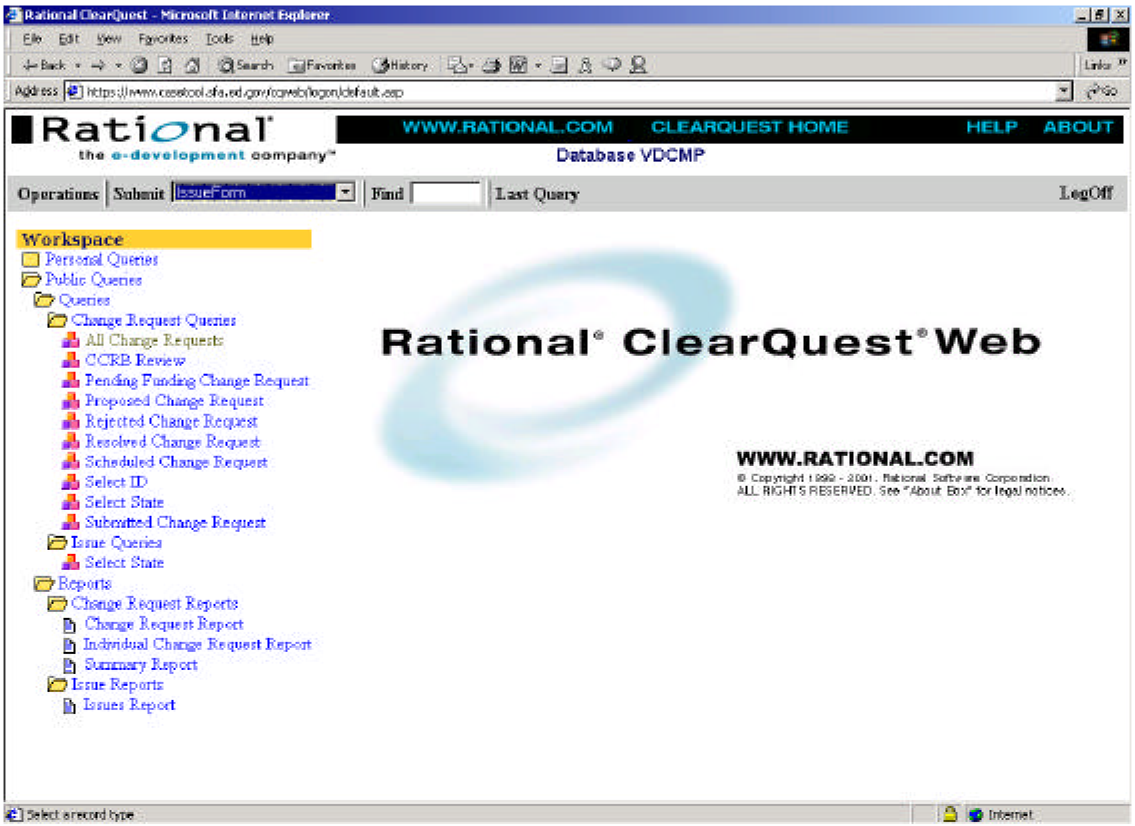
A change request moves to the 'Closed Rejected' state after being closed from the 'Rejected' state.

All previously required fields must remain filled in to successfully advance to this state.

5. Using the Enterprise Change Management ClearQuest Schema – Enhancements Record Type

5.1 Submitting a New Enhancements

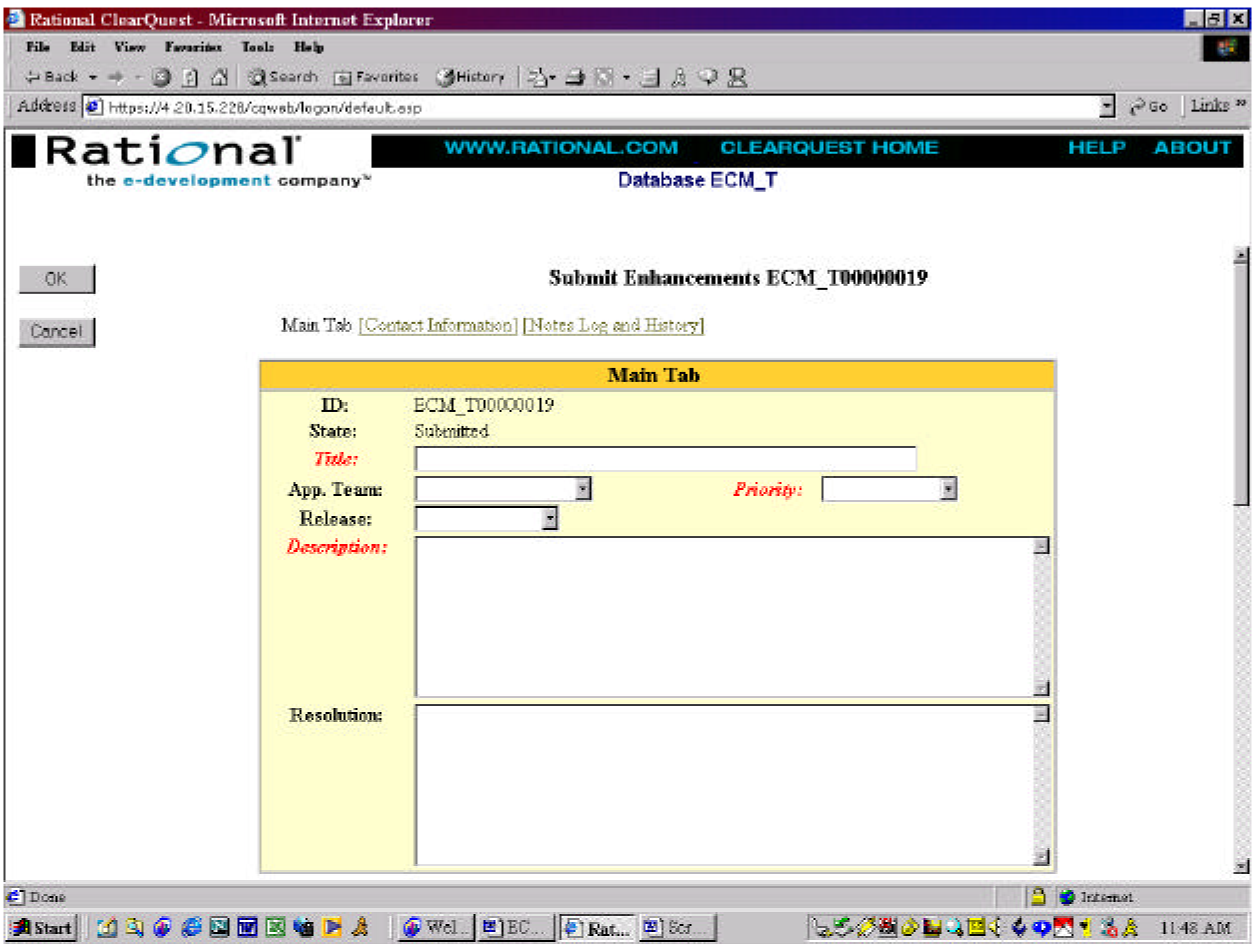
Creating a new enhancement is similar to submitting a new change request for the ChangeRequestForm record type. Select ‘Enhancements’ from the ‘Submit’ dropdown list. Then click on ‘Submit’ from the toolbar.

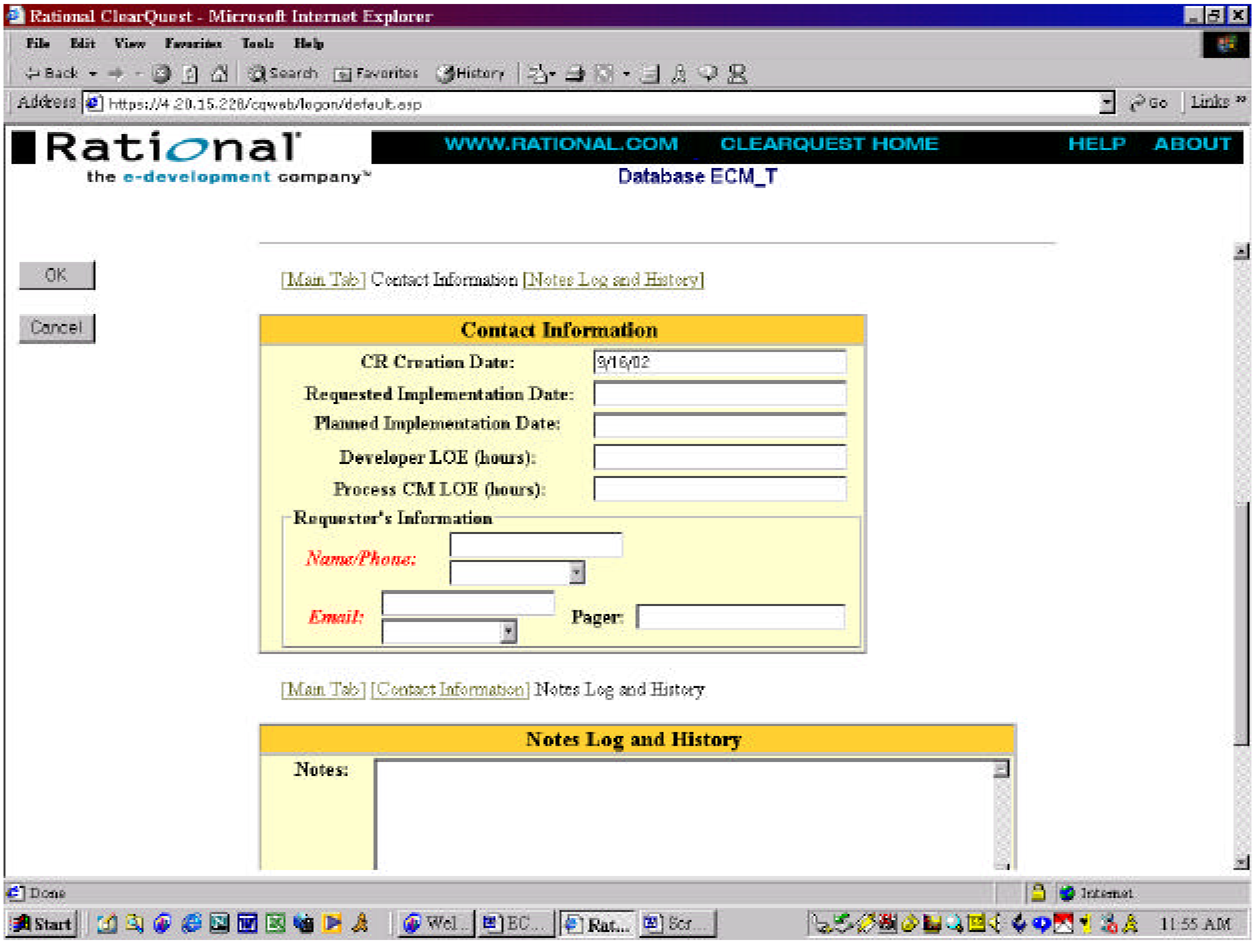


After clicking on 'Submit' for the 'Enhancements', the following form will appear. 'Title' and 'Issue Request Date' are the only required fields to initially submit the record. Once you have completed the form, click on the 'Ok' button to submit the record.

The following fields are mandatory in order to successfully submit an Enhancements change request (as signified by the RED label).

- Title
- Priority
- Description
- Requester's Name/Phone
- Requester's Email

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WWW.RATIONAL.COM CLEARQUEST HOME HELP ABOUT
Database ECM_T
OK
Cancel
[Main Tab] Contact Information [Notes Log and History]
Contact Information
CR Creation Date: 9/16/02
Requested Implementation Date:
Planned Implementation Date:
Developer LOE (hours):
Process CM LOE (hours):
Requester's Information
Name/Phone:
Email:
Pager:
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Notes Log and History
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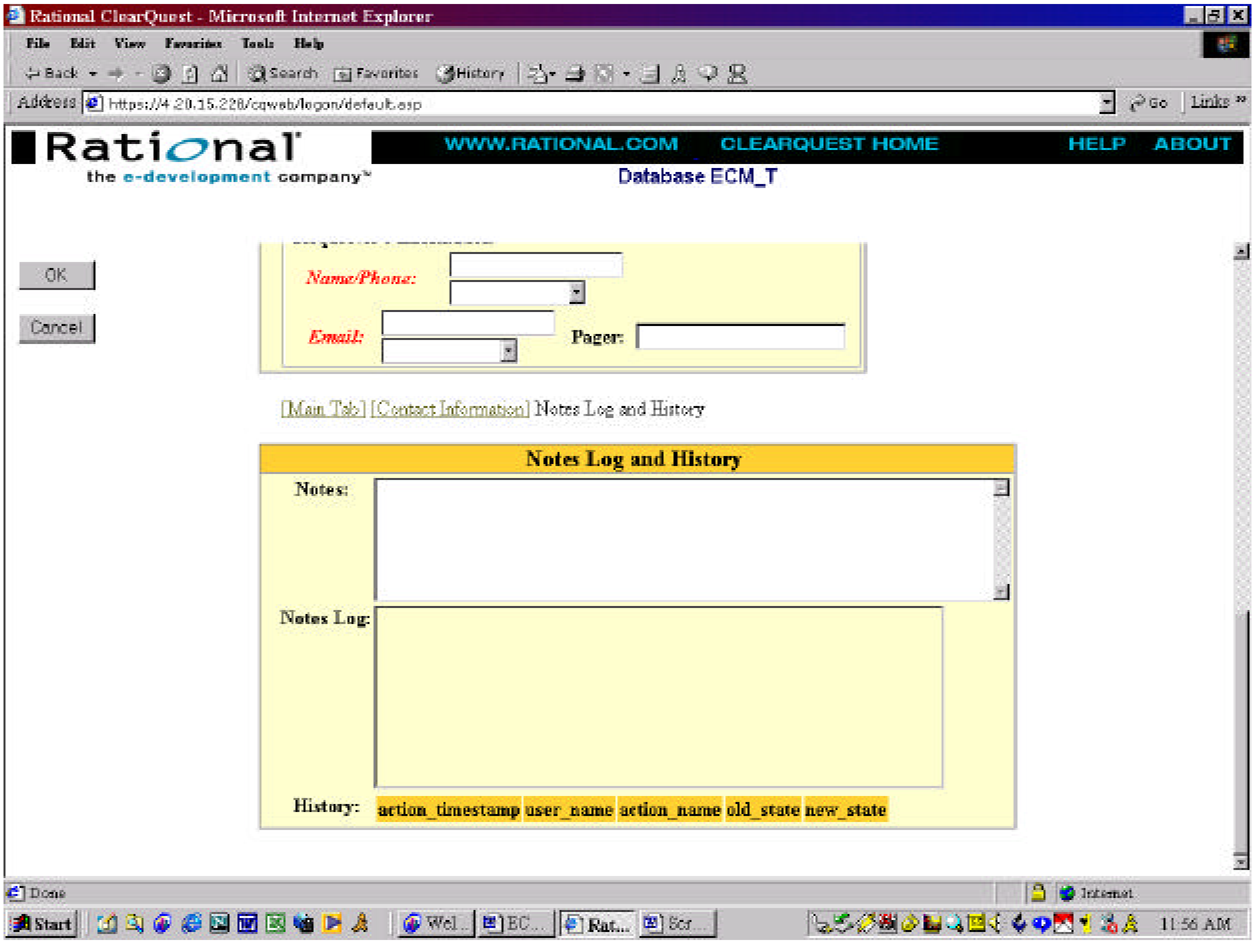
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File Edit View Favorites Tools Help
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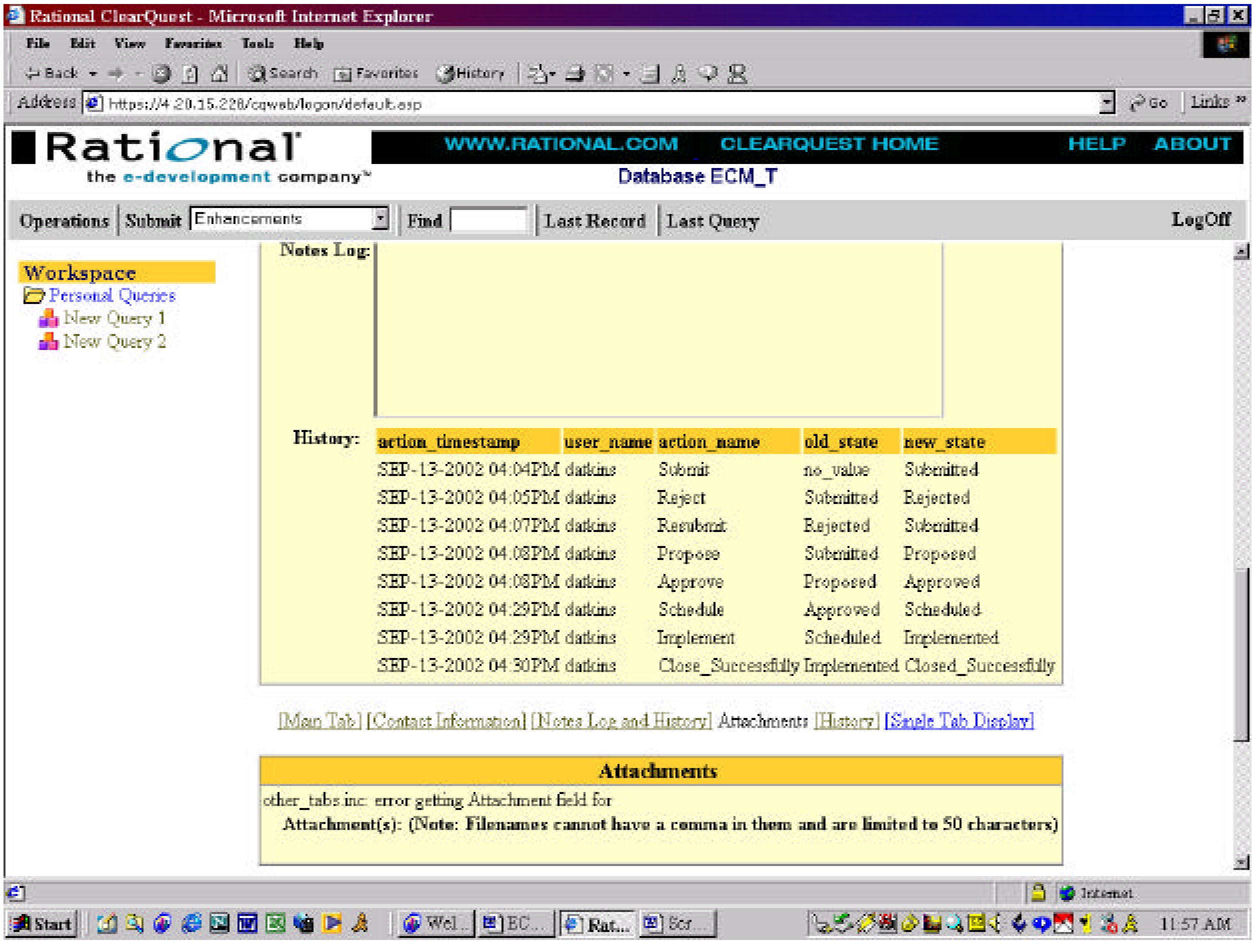
action_timestamp user_name action_name old_state new_state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File Edit View Favorites Tools Help
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Address https://4.20.15.228/cqweb/logon/default.asp
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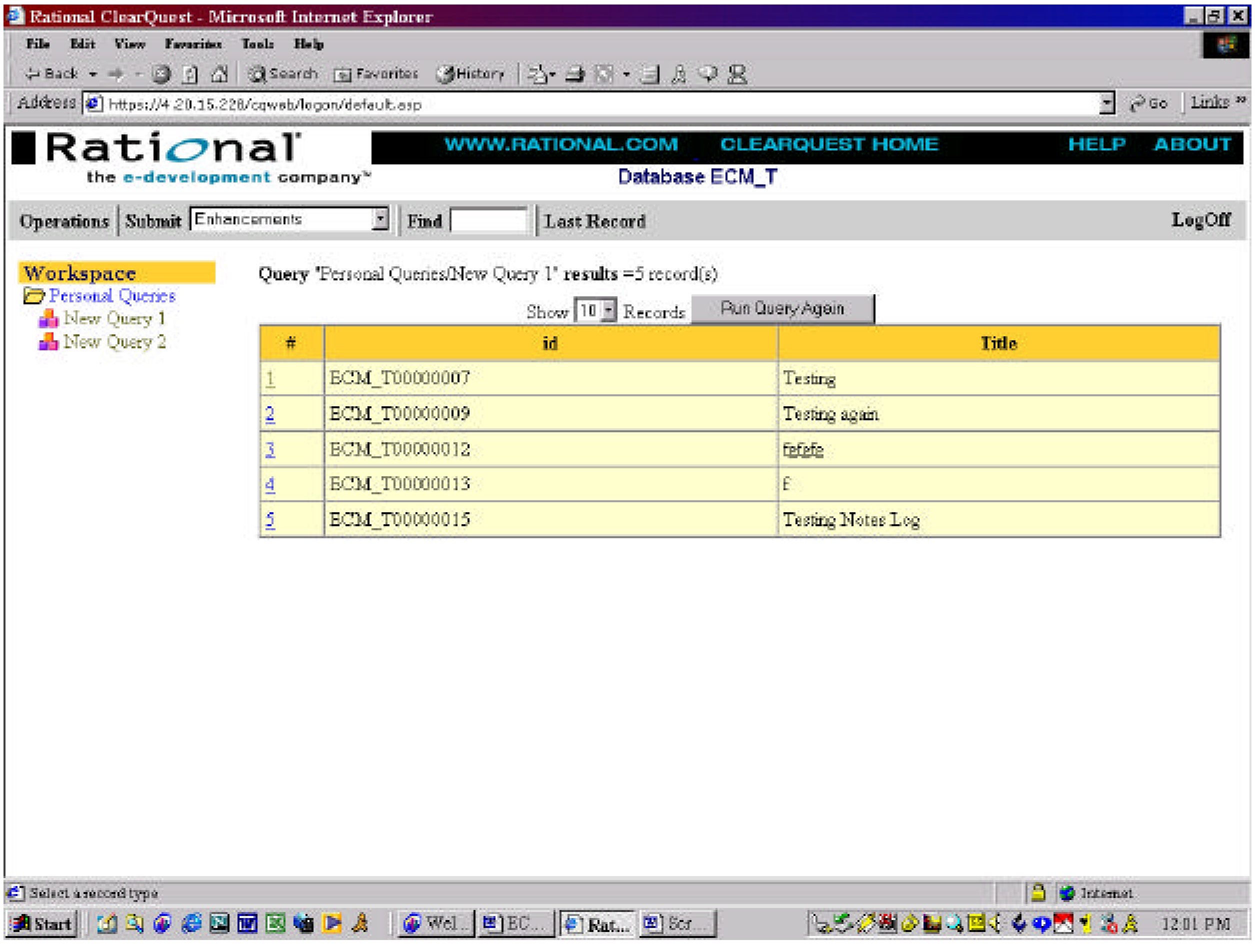
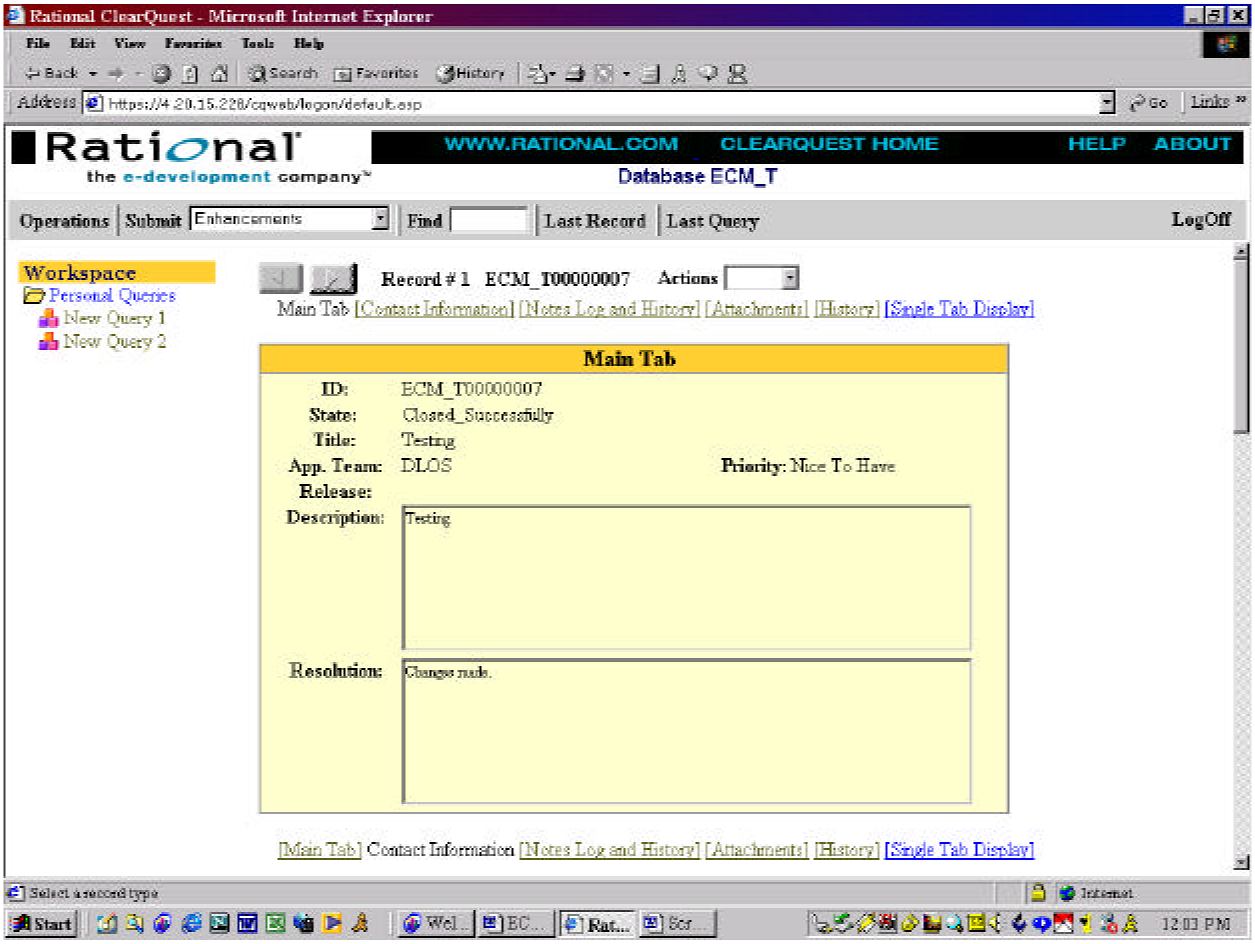
Rational the e-development company
WWW.RATIONAL.COM CLEARQUEST HOME HELP ABOUT
Database ECM_T
Operations Submit Enhancements Find Last Record Last Query LogOff
Workspace
Personal Queries
New Query 1
New Query 2
Notes Log:
History:
action_timestamp user_name action_name old_state new_state
SEP-13-2002 04:04PM datkins Submit no_value Submitted
SEP-13-2002 04:05PM datkins Reject Submitted Rejected
SEP-13-2002 04:07PM datkins Resubmit Rejected Submitted
SEP-13-2002 04:08PM datkins Propose Submitted Proposed
SEP-13-2002 04:08PM datkins Approve Proposed Approved
SEP-13-2002 04:29PM datkins Schedule Approved Scheduled
SEP-13-2002 04:29PM datkins Implement Scheduled Implemented
SEP-13-2002 04:30PM datkins Close_Successfully Implemented Closed_Successfully
[Main Tab] [Contact Information] [Notes Log and History] Attachments [History] [Single Tab Display]
Attachments
other_tabs.inc: error getting Attachment field for
Attachment(s): (Note: Filenames cannot have a comma in them and are limited to 50 characters)
Internet
Start
11:57 AM

5.2 Modifying an Existing Enhancements Change Request



In order to edit an enhancement that has been previously submitted, the user will have to select an existing query from the 'Public Queries' – 'Queries' folder or select a query created in the personal folder. The above is an example screen shot of the 'Select State' query run for 'Submitted' state records in the 'Public Queries' – 'Queries' – 'Enhancements Queries' folder.

The user will have to click the numbered hyper link, located in the column labeled '#', in order to gain access to a particular change request.



Assuming that Record #1 was selected from the previous page, the page above will be displayed. As shown, the 'Actions' selection window will allow the user to modify or assign the issue. (Please refer to section 3 to determine the process flow of the issue.)

Initially the record will be displayed as read-only. However, if the user selects 'Modify', or any other available actions other than 'Delete' as the desired action, changes can be made within the text fields.

**Note: Refer to section 3.2 to see the Enhancements Process Flow for section 5.3 – 5.10.

5.3 Submitted State

An enhancement moves to the ‘Submitted’ state after being submitted by the user. From the ‘Submitted’ state, the change request can move to the ‘Proposed’ or ‘Rejected’ states.

5.4 Proposed State

An enhancement moves to the ‘Proposed’ state after being proposed from the ‘Submitted’ state. From the ‘Proposed’ state, the enhancement can move to the ‘Approved’ or ‘Rejected’ states.

5.5 Approved State

An enhancement moves to the ‘Approved’ state after being approved from the ‘Proposed’ state. From the ‘Proposed’ state, the enhancement can move to the ‘Scheduled’ or ‘Rejected’ states.

5.6 Scheduled State

An enhancement moves to the ‘Scheduled’ state after being scheduled from the ‘Approved’ state. From the ‘Scheduled’ state, the enhancement can move to the ‘Implemented’ or ‘Rejected’ states.

5.7 Implemented State

An enhancement moves to the ‘Implemented’ state after being implemented from the ‘Scheduled’ state. From the ‘Implemented’ state, the enhancement can move to the ‘Closed Successfully’ or ‘Rejected’ states.

5.8 Rejected State

An enhancement moves to the ‘Rejected’ state after being rejected from the ‘Submitted’, ‘Proposed’, ‘Approved’, ‘Scheduled’, and ‘Implemented’ states. From the ‘Rejected’ state, the enhancement can move to the ‘Submitted’ or ‘Closed Rejected’ states.

5.9 Closed Successfully State

An enhancement moves to the 'Closed Successfully' state after being close successfully from the 'Implemented' state.

5.10 Closed Rejected State

An enhancement moves to the 'Closed Rejected' state after being close rejected from the 'Rejected' state.

6. Queries

In order to find a specific record or records, queries are used to locate the records from the database. There are two main folders in the Workspace: 'Personal Queries' and 'Public Queries'. Any queries created by users are always stored in the 'Personal Queries' folder. Several predefined queries have been created during the development of the ECM tool and are located in the 'Public Queries' folder.

6.1 Predefined Queries

This section details the existing queries available to anyone in the Public Queries folder.

6.1.1 Change Request Queries

To run a change request query, select the desired query in the 'Public Queries -> Queries -> Change Request Queries'. Listed below are the change request queries.

- **All Change Requests** – Displays a summary view of the change request. This summary includes the 'ID', 'State', 'Title', 'Priority', 'Requester', and 'Assignee' fields. To see the actual change request, click on the numbered hyper link in the far left column.

- **CCRB Review** – Displays all change requests in the 'CCRB Review' state. This summary includes the 'ID', 'Title', 'Priority', 'Requester', and 'Assignee' fields. To see the actual change request, click on the numbered hyper link in the far left column.

- **Pending Funding** – Displays all change requests in the 'Pending Funding' state. This summary includes the 'ID', 'Title', 'Priority', 'Requester', and 'Assignee' fields. To see the actual change request, click on the numbered hyper link in the far left column.

- **Proposed** – Displays all change requests in the 'Proposed' state. This summary includes the 'ID', 'Title', 'Priority', 'Requester', and 'Assignee' fields. To see the actual change request, click on the numbered hyper link in the far left column.

- **Rejected** – Displays all change requests in the 'Rejected' state. This summary includes the 'ID', 'Title', 'Priority', 'Requester', and 'Assignee' fields. To see the actual change request, click on the numbered hyper link in the far left column.

- **Resolved** – Displays all change requests in the 'Resolved' state. This summary includes the 'ID', 'Title', 'Priority', 'Requester', and 'Assignee' fields. To see the actual change request, click on the numbered hyper link in the far left column.

- **Scheduled** – Displays all change requests in the 'Scheduled' state. This summary includes the 'ID', 'Title', 'Priority', 'Requester', and 'Assignee' fields. To see the actual change request, click on the numbered hyper link in the far left column.

- **Select ID** – The user is prompted to "Enter the ID of the Change Request you are looking for in the Criteria field". The user can search for an exact match by selecting "equals", or if they only know part of the 'ID' of a record they can search by selecting "contains". The query includes the 'ID', 'State', 'Title', 'Priority', 'Requester', and 'Assignee'.

- **Select State** – The user is prompted to select one to many states. The query will return records that match the selected state(s). This summary includes the 'ID', 'State', 'Title', 'Priority', 'Requester', and 'Assignee' fields. To see the actual change request, click on the numbered hyper link in the far left column.

- **Submitted to DC** – Displays all change requests in the 'Submitted' state. This summary includes the 'ID', 'Title', 'Priority', 'Requester', and 'Assignee' fields. To see the actual change request, click on the numbered hyper link in the far left column.

- **Drafted** – Displays all change requests in the 'Drafted' state. This summary includes 'ID', 'Title', 'State', 'Priority' and 'Requester Contact Info'. To see the actual change request, click on the numbered hyper link in the far left column.

6.1.2 Enhancements Queries

To run an enhancement query, select the desired query in the 'Public Queries -> Queries -> Enhancements Queries' folder. Listed below are the enhancements queries.

- **All Enhancements** – The query will return all records within the Enhancements record type. This summary includes the 'ID', 'State', 'Title', 'Priority', and 'Requester's Name/Phone fields. To see the actual enhancements, click on the numbered hyper link in the far left column.

- **Submitted Enhancements** - The query will return all submitted records within the Enhancements record type. This summary includes the 'ID', 'State', 'Title', 'Priority', and ’Requester’s Name/Phone fields. To see the actual enhancements, click on the numbered hyper link in the far left column.

- **Proposed Enhancements** - The query will return all proposed records within the Enhancements record type. This summary includes the ‘ID’, ‘State’, ‘Title’, ‘Priority’, and ’Requester’s Name/Phone fields. To see the actual enhancements, click on the numbered hyper link in the far left column.

- **Approved Enhancements** - The query will return all approved records within the Enhancements record type. This summary includes the ‘ID’, ‘State’, ‘Title’, ‘Priority’, and ’Requester’s Name/Phone fields. To see the actual enhancements, click on the numbered hyper link in the far left column.

- **Scheduled Enhancements** - The query will return all scheduled records within the Enhancements record type. This summary includes the ‘ID’, ‘State’, ‘Title’, ‘Priority’, and ’Requester’s Name/Phone fields. To see the actual enhancements, click on the numbered hyper link in the far left column.

- **Implemented Enhancements** - The query will return all implemented records within the Enhancements record type. This summary includes the ‘ID’, ‘State’, ‘Title’, ‘Priority’, and ’Requester’s Name/Phone fields. To see the actual enhancements, click on the numbered hyper link in the far left column.

- **Rejected Enhancements** - The query will return all rejected records within the Enhancements record type. This summary includes the ‘ID’, ‘State’, ‘Title’, ‘Priority’, and ’Requester’s Name/Phone fields. To see the actual enhancements, click on the numbered hyper link in the far left column.

6.2 Field List for Queries

In order to build a query, the user must know the database field name for the specific field they want to display in the query. Listed below are the database field names and their corresponding label that appears in the ClearQuest forms.

6.2.1 Change Request Fields

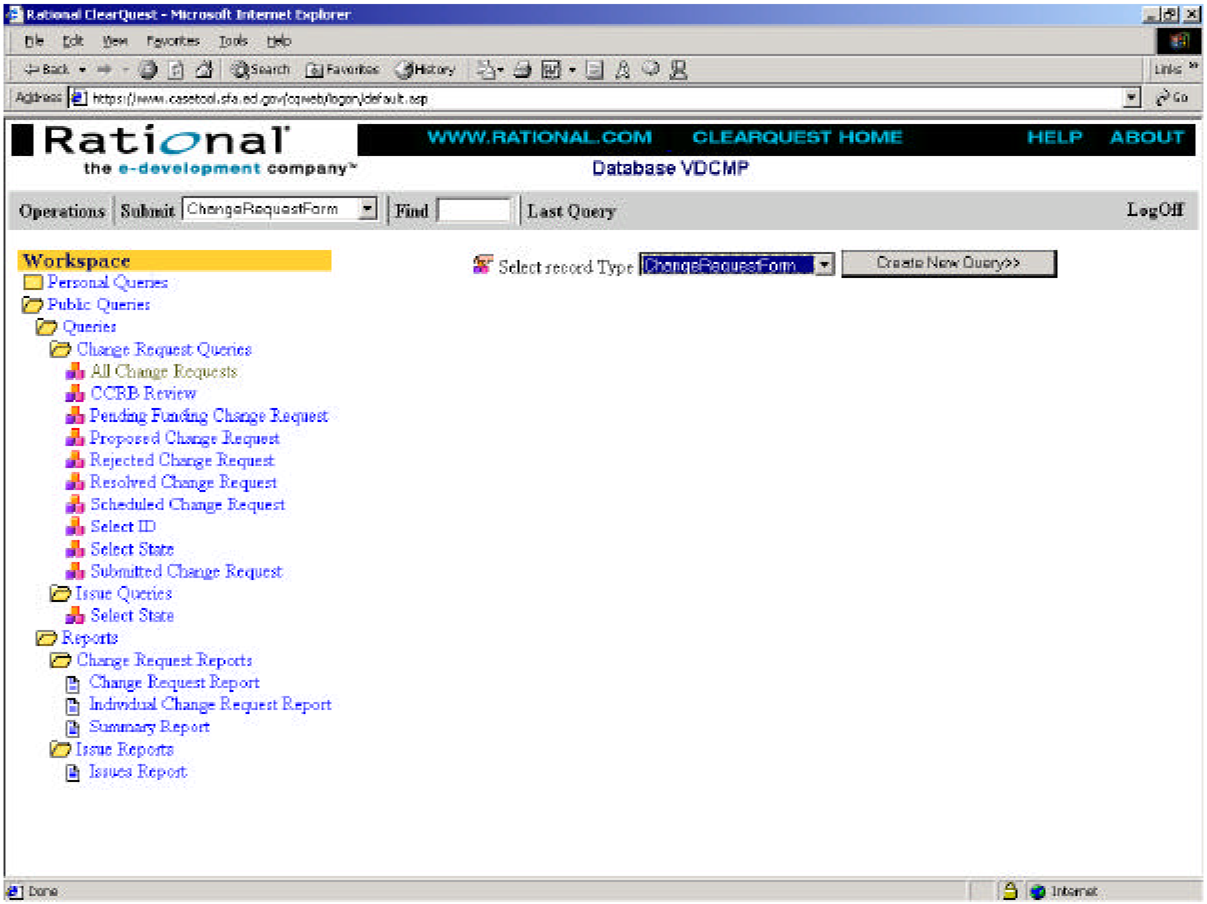
Label	Field Name
ID	id
Data Center Reference Number	GCARS_Ref_Number
Other Reference Number	Other_Ref_Number1
Other Reference Number	Other_Ref_Number2
State	State
Environment	Environment
Title	Title
Description	Description
Priority	Priority
Risk Assessment	Risk_Assessment
Backout/Recovery Plan	Backup_Plan
Emergency Justification	Emergency_Justification
Requested Implementation Date	Req_Implement_dt
Planned Implementation Date	Planned_implement_dt
CR Creation Date	CR_Creation_Date
Estimated Duration to Complete Changes	Est_Complete_Change
Estimated Duration to Backout Changes	Est_Backout
Can the request be Completed Early?	Complete_Early
Dependencies	Dependencies
Review Deadline	Review_Deadline
Is the Change Request Funded?	CR_Funded
Funding Signoff	Funding_Signoff
Primary System Affected	Systems_Affected
Notification Group	System_Group
System Components Affected	System_Components
Hardware Affected	Hardware_Affected
Other Systems Affected	Systems_Affected2
	Systems_Affected3
	Systems_Affected4
	Systems_Affected5
	Systems_Affected6

Other Notification Groups	System_Group2 System_Group3 System_Group4 System_Group5 System_Group6
Notes	Notes
Notes Log	Note_Archive
History	-
Requester's Name/Phone	Requester_Contact_Info
Requester's Email	Req_Email
Requester's Pager	Req_Pager
Developer's Name/Phone	Developer_Contact_Info
Developer's Email	Dev_Email
Developer's Pager	Dev_Pager
Assignee's Name/Phone	Assignee_Contact_Info
Assignee's Email	App_Email
Assignee's Pager	App_Pager
Data Center POC's Name/Phone	POC_Contact_Info
Data Center POC's Email	POC_Email
Data Center POC's Pager	POC_Pager
Attachment(s)	Attachment
Impact Analysis Complete	Impact_Analysis
Action Required	Action_Required
GCARS Updated	GCARS_Completed

6.2.2 Enhancements Fields

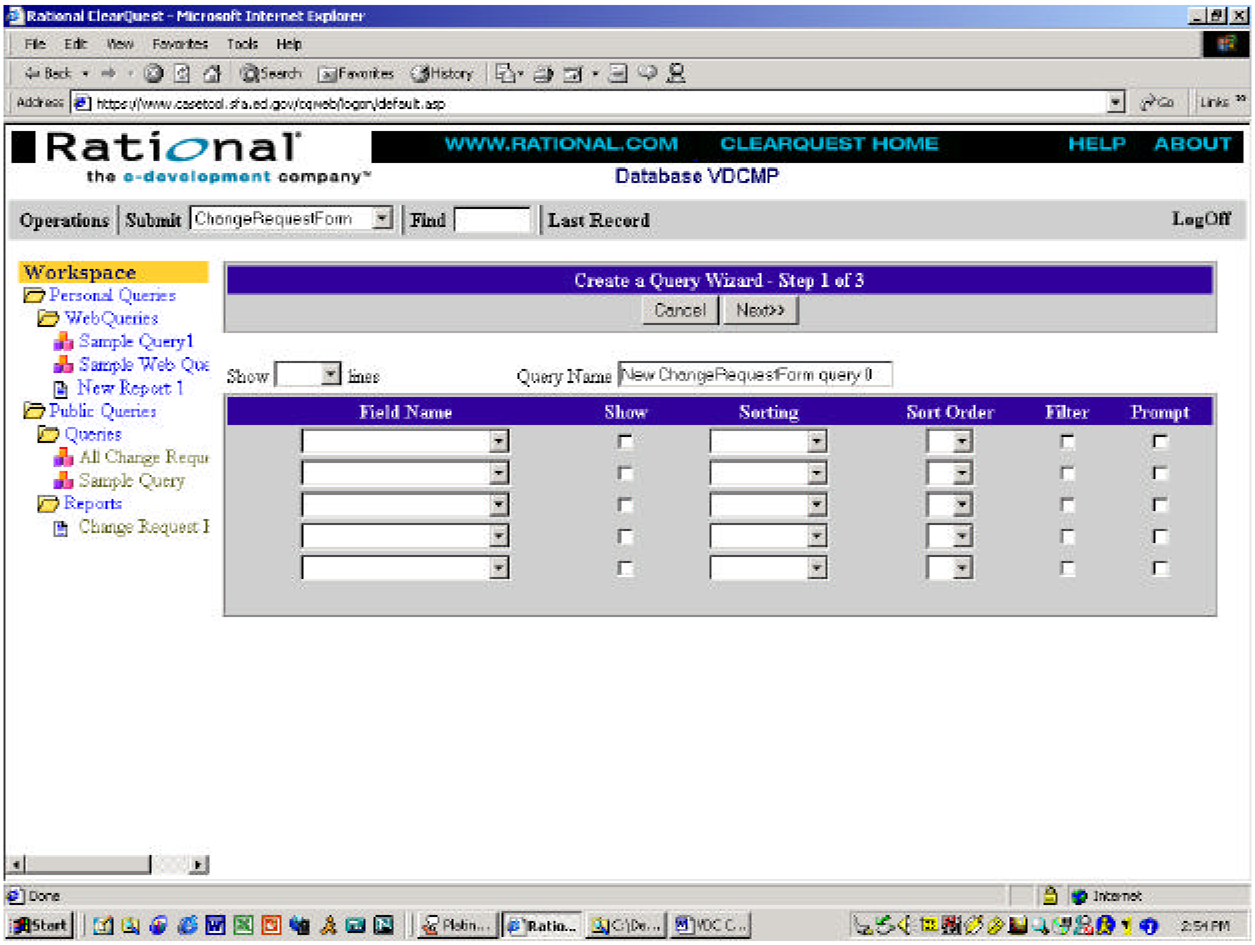
Label	Field Name
ID	id
State	State
Title	Title
App. Team	Project
Priority	Priority
Release	Release
Description	Description
Resolution	Resolution
CR Creation Date	CR_Creation_dt
Requesested Implementation Date	Req_Imp_dt
Planned Implementation Date	Planned_Imp_dt
Developer LOE (hours)	Developer_LOE
Process CM LOE (hours)	Process_CM_LOE
Notes	Notes
Notes Log	Notes_Archive
History	-
Attachments	-

6.3 Creating Queries



ClearQuest facilitates the development of queries that help the user to locate records by project or component, by assignee, by level of severity, and so on. In addition to the predefined queries listed in Section 5.1, the user can create his/her own queries.

To create a new query, the user must select ‘Create a Simple Query’ in the ‘Operations’ menu. Once this is done the page above will be displayed. The user must select the ‘ChangeRequestForm’ record type from the ‘Select Record Type’ selection window. Once this is done, the user must click the ‘Create New Query’ button.

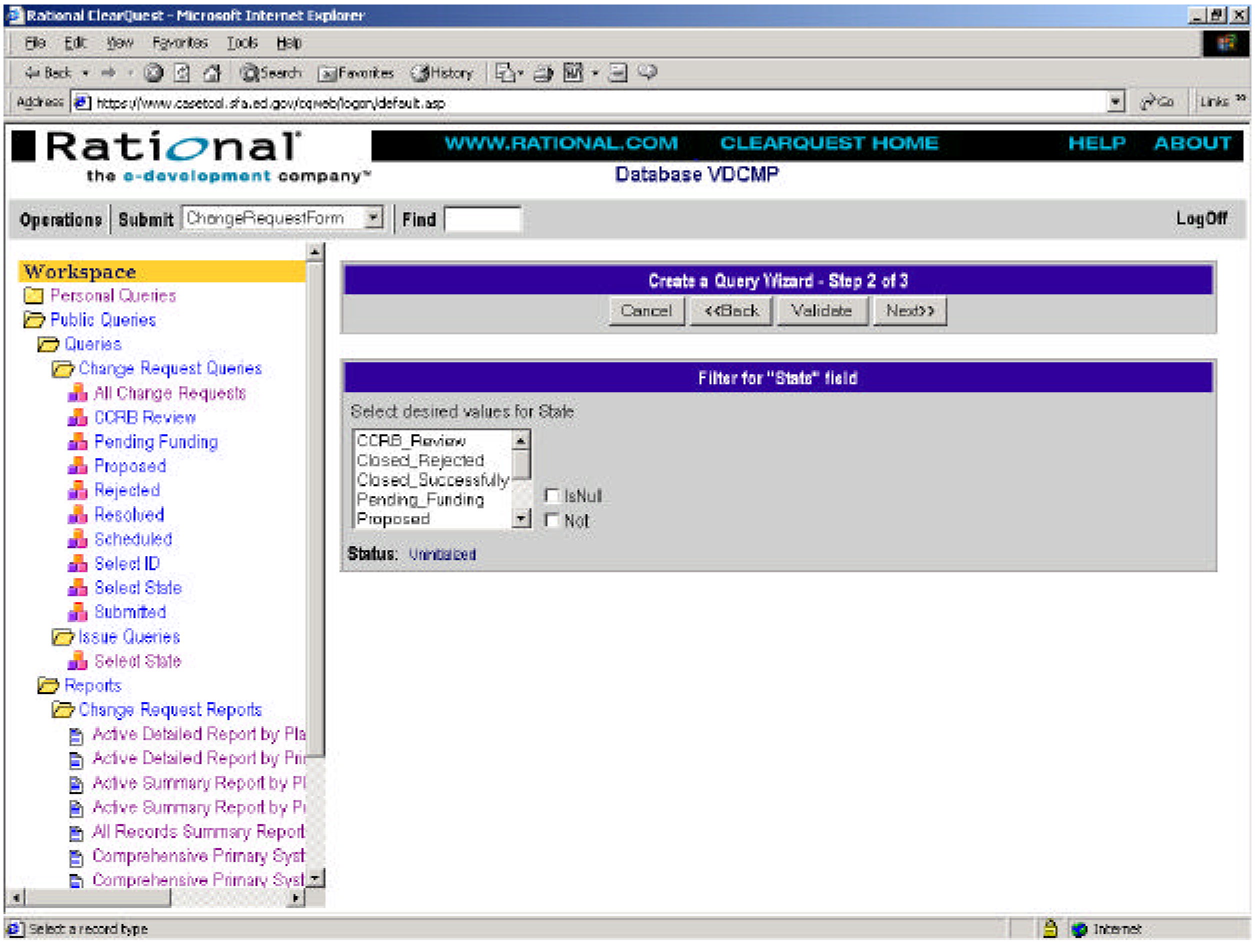


Once the 'Create New Query' button is clicked, the page above will appear. The user will be able to create a query based on certain information. The user must name the query, select which field names to query from and determine if a specific displaying order is needed. See Section 6.2 for the field names to use in a query.

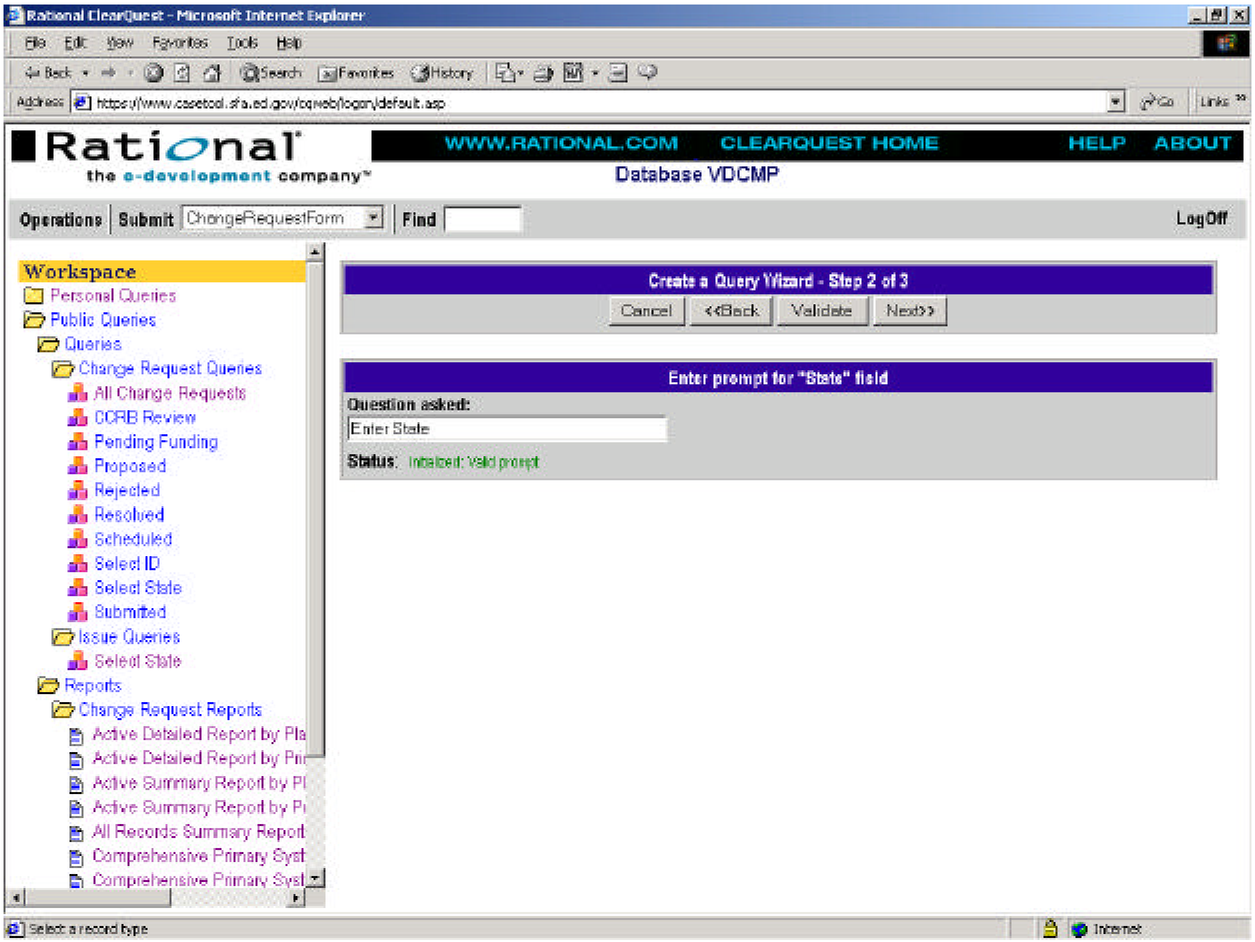
If the user checks the 'Filter' box, they will have the ability to filter based on that field in the query.

Check the 'Prompt' box to build a query that will prompt the user to select or enter a certain value or values for that field. For example, if the user built a query that will prompt for 'State', the user will be asked what states they want included in the query before the query is run. This column is used to create dynamic queries.

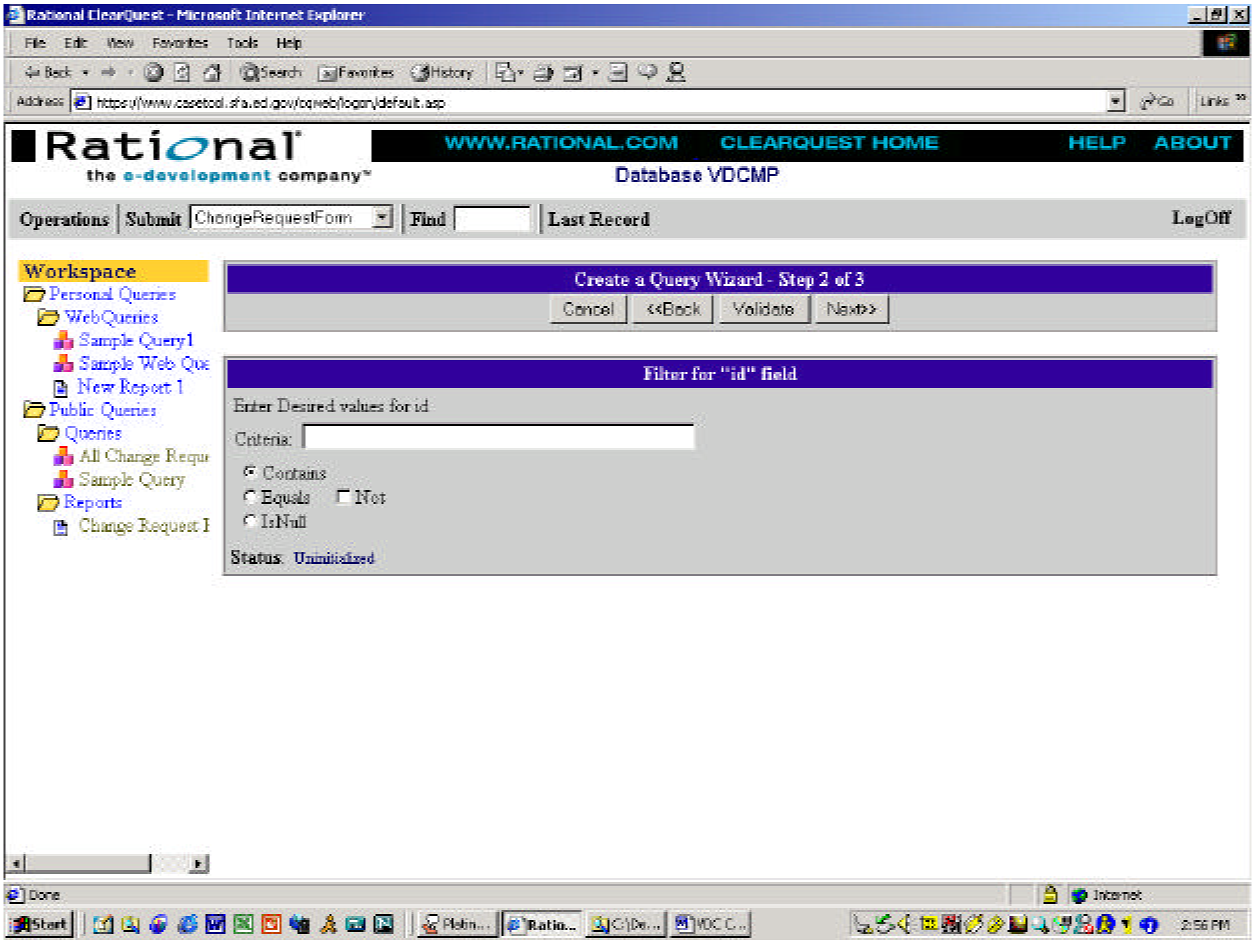
When done selected fields and other information, the user must click the 'Next' button.



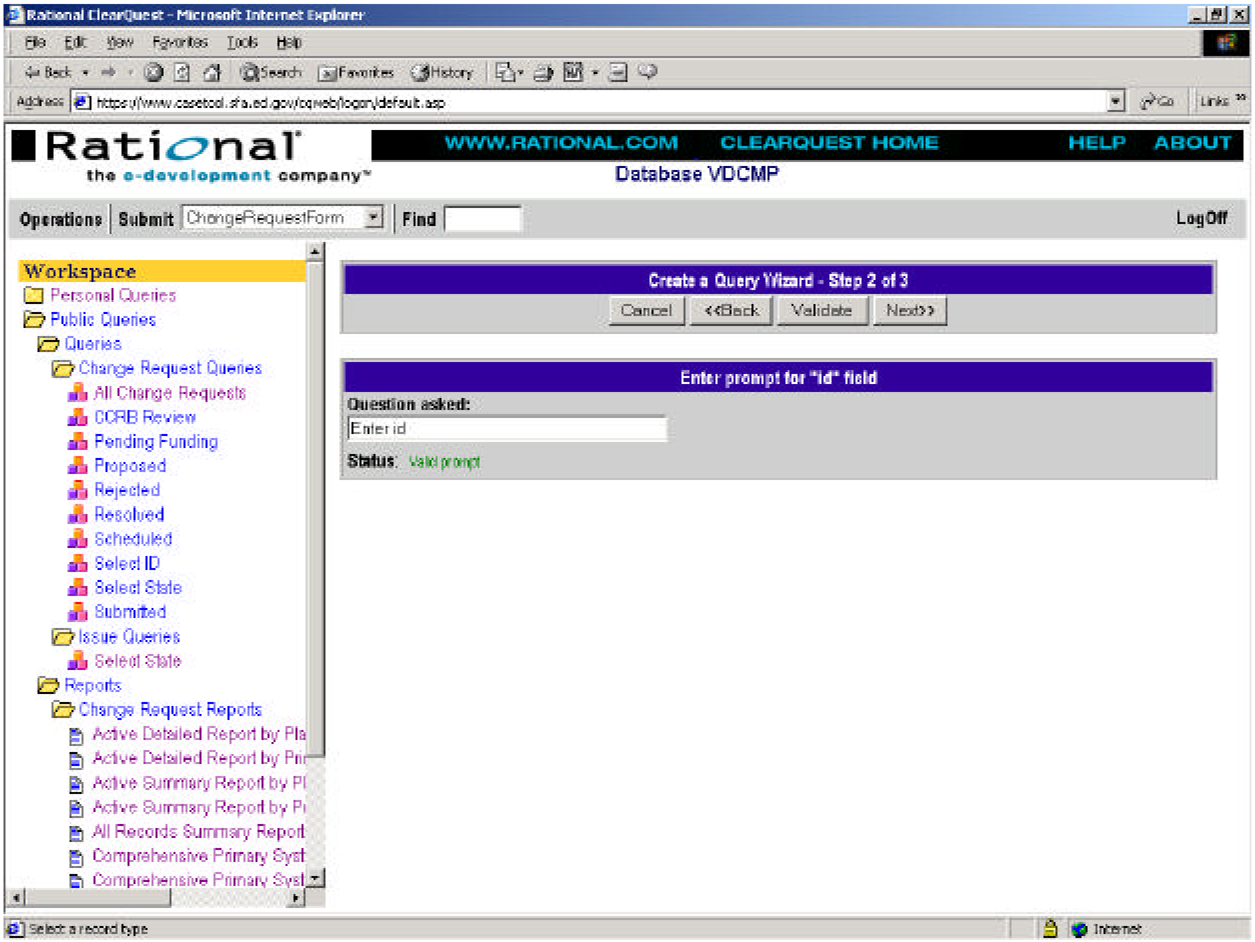
Sample filter screen for a field with a list box. The user will specify what values will always be returned by the query, in this case, what state(s).



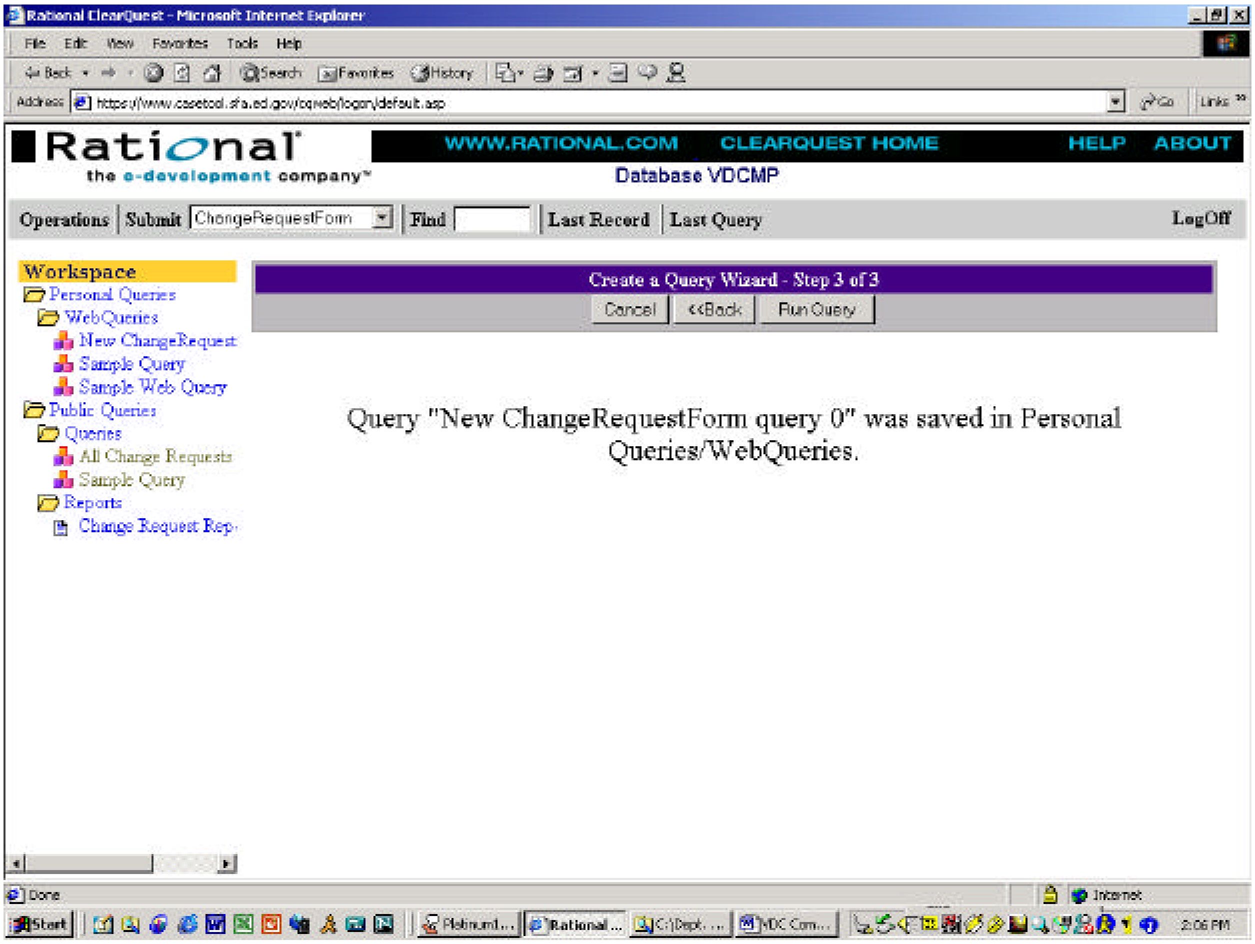
Sample prompt screen for a field with a list box. The query creator will only specify the question that will be presented to the user that runs the query here. The user that runs the query will select the value(s) to include, in this case, what states.



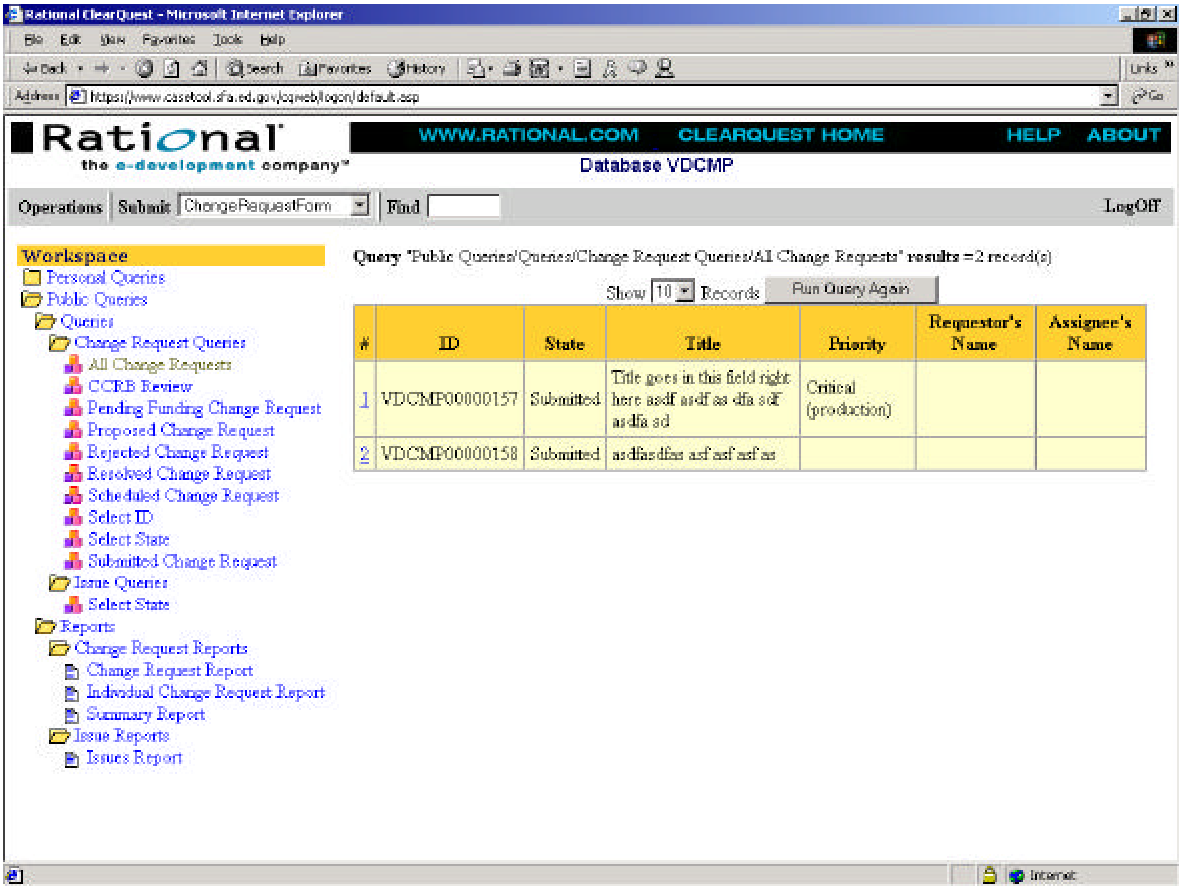
Sample filter screen for a text field. The user will specify what to include in the query. In this case, a specific change request ID could be specified. Within the ‘Criteria’ field, the user can enter a value to index the filtered information. The ‘Contains’ radio button, the ‘Equals’ radio button, the ‘Not’ check box, and the ‘IsNull’ radio button are used to help filter the information.



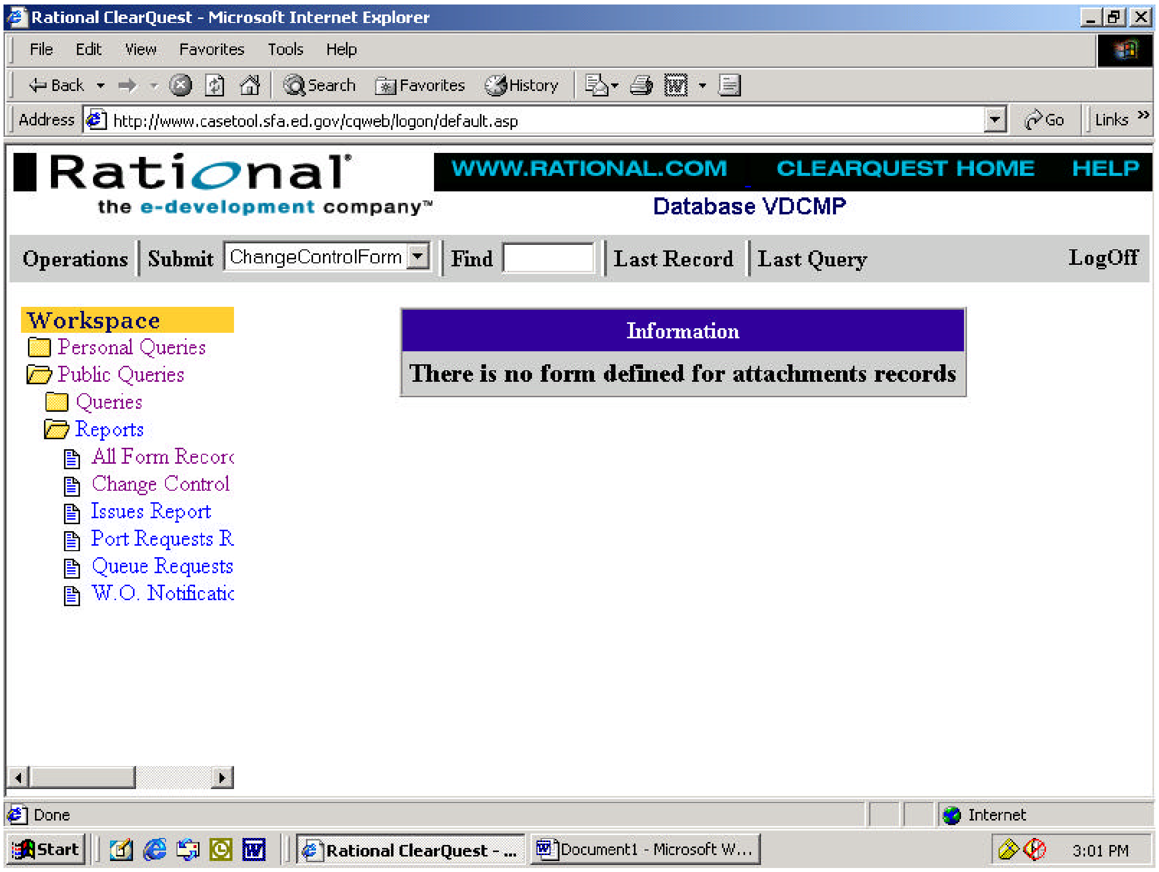
Sample prompt screen for a text field. The creator of the query will enter the prompt that will appear to the user when they run this query. In this case, it will ask the person running the query for an ID.



Once the criteria are entered and the ‘Next’ button is clicked, the page above will be displayed. The user can cancel creating a new query, go back to the previous page, or run the query.

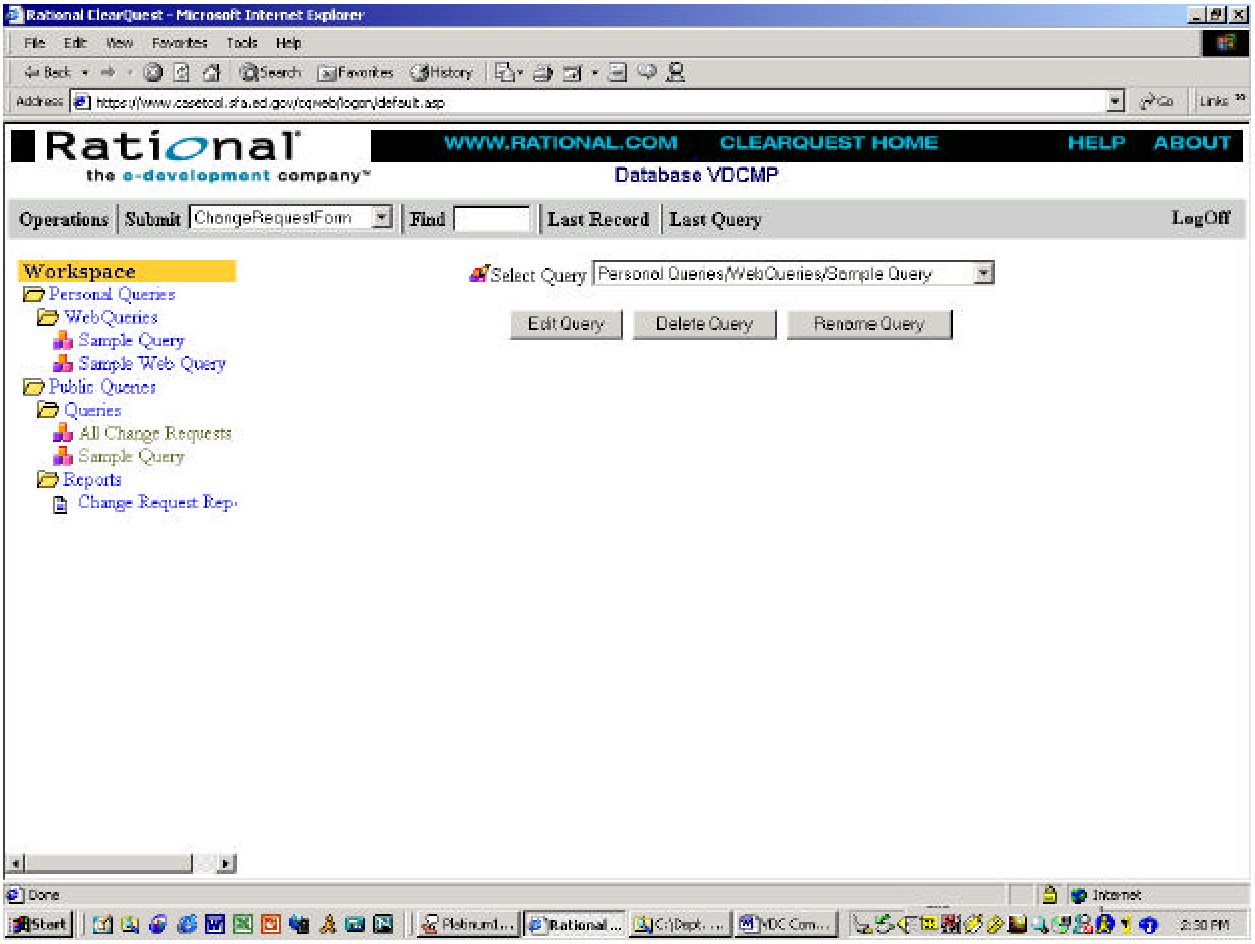


If the user clicks the 'Run Query' button, a query will be run based on the information entered in step 1. If results are found according to the search criteria, then the records will be displayed. The user can click the numbered hyper link to see the actual change request that is being referenced.

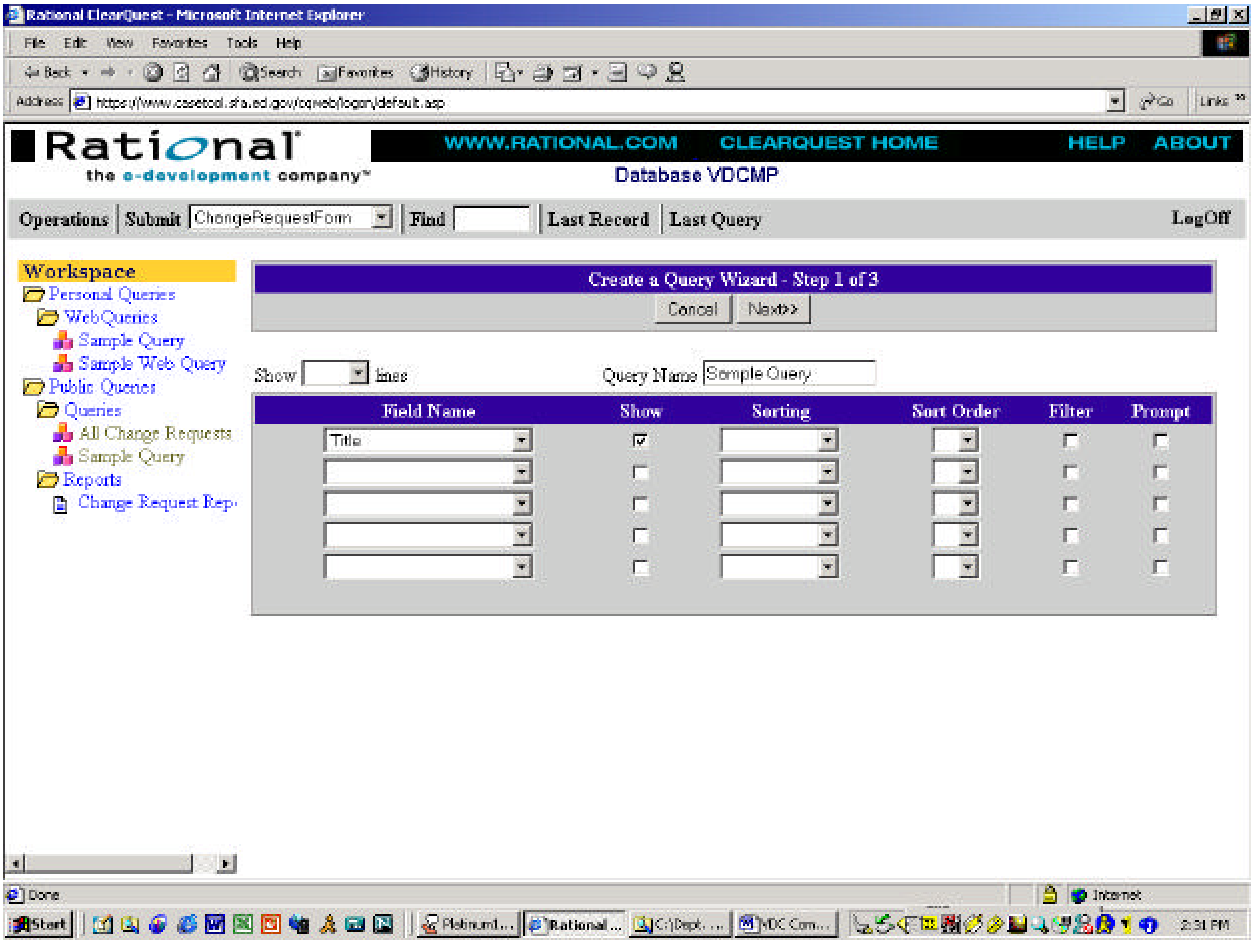


If no records can be found to match the specifics of the query, a page similar to the page above will be displayed.

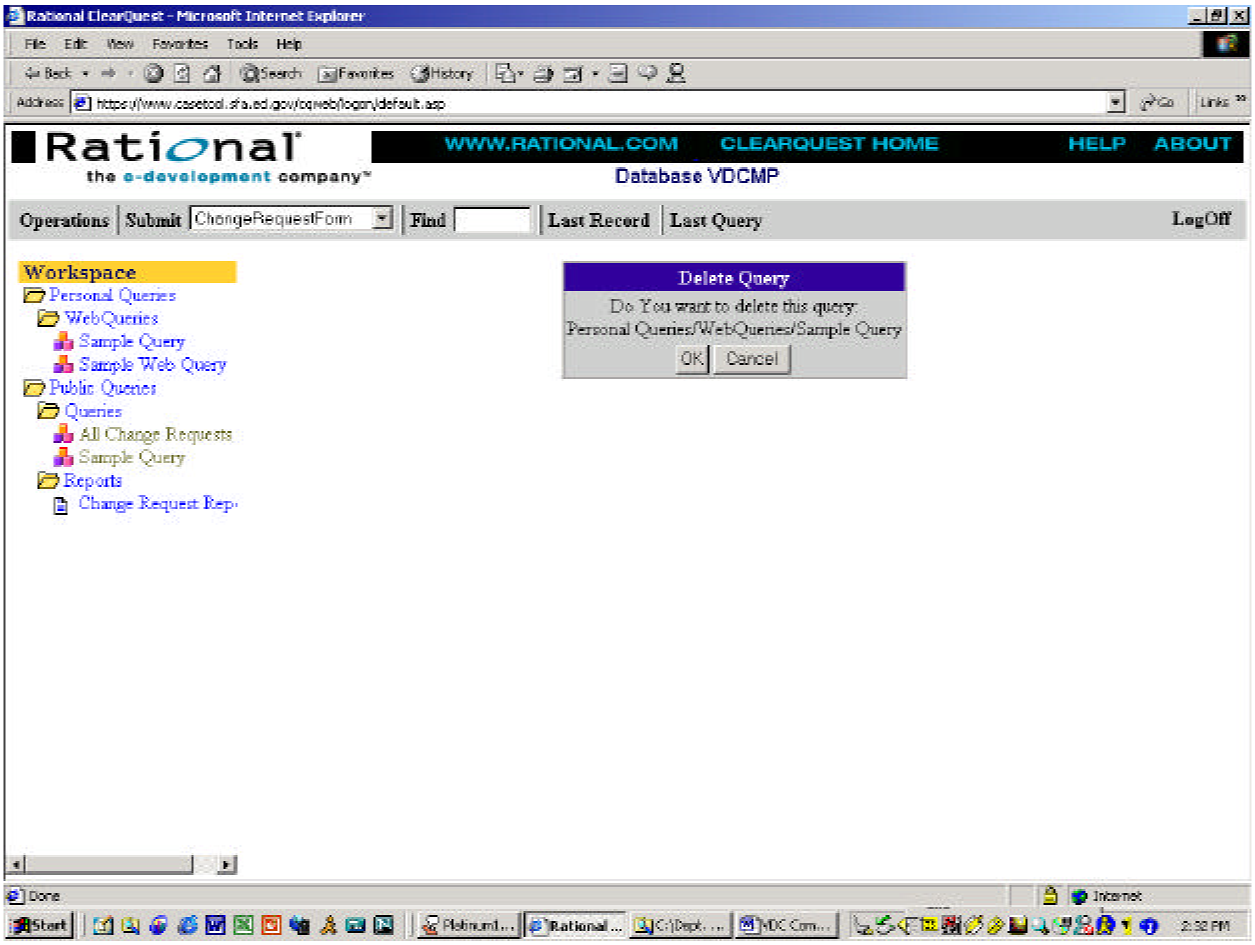
6.4 Modifying an Existing Query



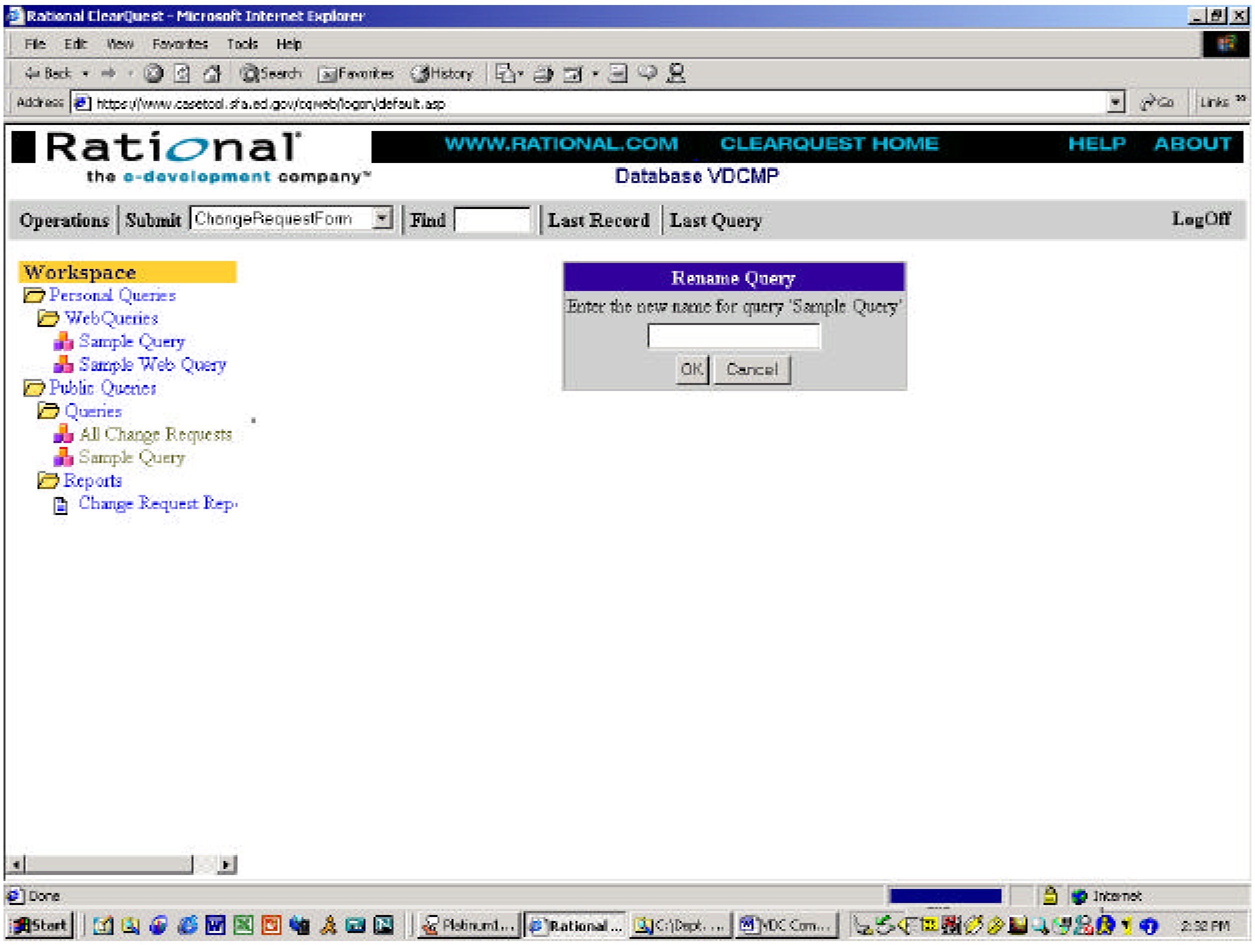
To edit an existing query, the user must select ‘Edit a Simple Query’ in the ‘Operations’ menu. Once this is done, the page above will appear. The user is prompted to select a query in the ‘Select Query’ drop-down window. The user must then click the ‘Edit Query’ button



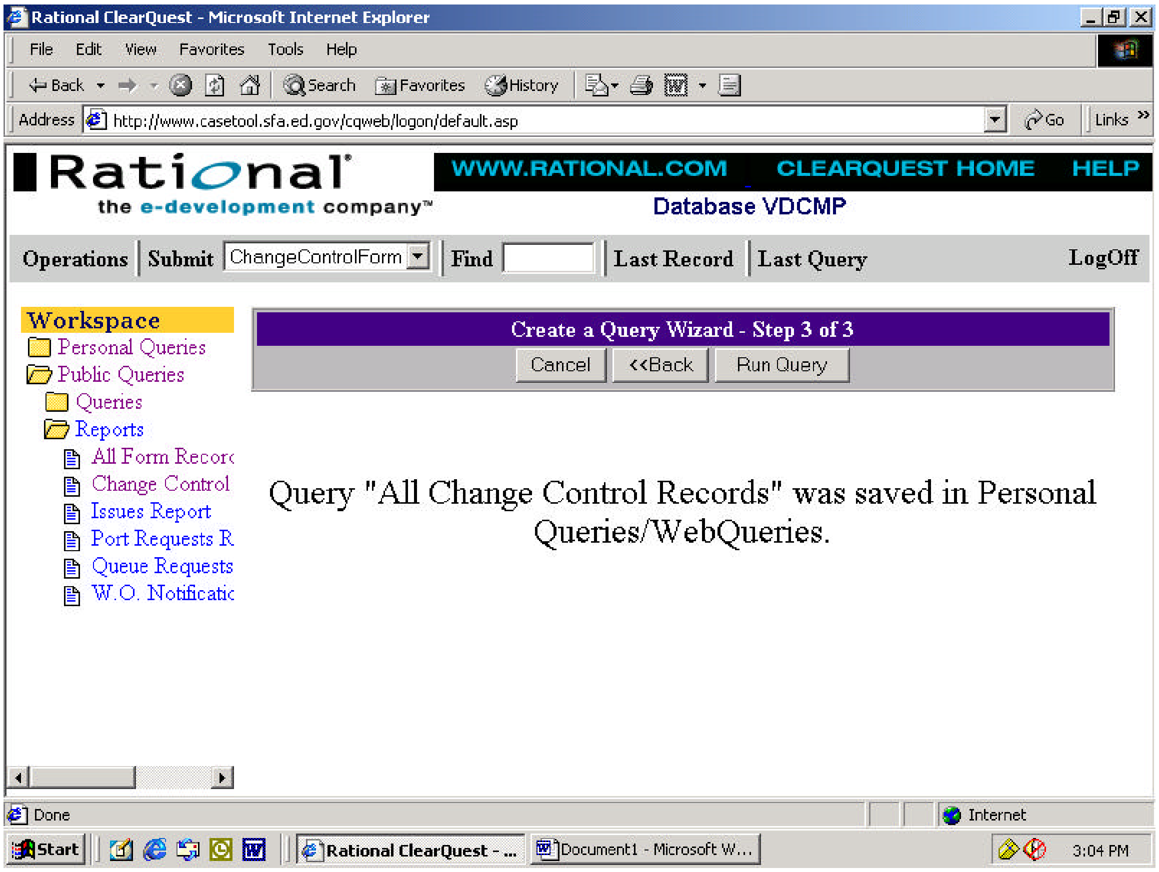
The page above will be displayed when the user clicks the 'Edit Query' button. The user will have the ability to request that certain fields be displayed, whether to sort data in ascending or descending order, filter information, etc.



If the user decides to delete a change request, a prompt will appear to determine that the user really wants to delete the change request. The name of the change request will also appear in the 'Delete Query' prompt box.



If the user clicks the 'Rename Query' button on the edit query page, a 'Rename Query' prompt box will appear. The user will have to enter the new name of the query and click 'OK' or the user can click 'Cancel' button to return to the 'Edit Query' page.



Once the user has completed editing, deleting, or renaming the change request, a confirmation page will appear similar to the page above.

7. Reports

Reports can be generated in order to view the status of a project at a glance. There are two main folders in the Workspace: ‘Personal Queries’ and ‘Public Queries’. The reports generated by user are always stored in the ‘Personal Queries’ folder. Several predefined reports have been created during the development of the ECM tool and are located in the ‘Public Queries’ folder.

7.1 Predefined Reports

This section details the existing reports available to anyone in the Public Queries folder.

7.1.1 Change Request Reports

Listed below are the existing change request reports available to users. To run a change request report, select a predefined report in the ‘Public Queries -> Reports -> Change Request Reports’ folder.

Detailed Reports will include the following fields: ID, Data Center Reference Number, State, Environment, Priority, Title, Risk Assessment, Backout/Recovery Plan, Emergency Justification, Requested Implementation Date, Planned Implementation Date, CR Creation Date, Estimated Time to Complete Changes, Estimated Time to Backout Changes, Can the CR be Completed Early?, Dependencies, Review Deadline, Is the CR Funded?, Funding Signoff, Primary System Affected, Other System(s) Affected, System Components Affected, Hardware Affected, Requester’s Information, Developer’s Information, Assignee’s Information, Data Center POC’s Information, Description, and Notes Log.

- **Active Detailed Report by Planned Implementation Date** – This is a detailed report (see the list of fields above). Uses the ‘Active Qry by Plan Imp Date’ change request query and the ‘Active Detailed Report Format by PID’ change request report format to display the change requests. The user is prompted to choose Prod and/or Dev environment CRs for the report. Only active (not in a Closed state) CR’s are returned. Sort order is by:
    - Environment
    - Planned Implementation Date
    - Primary System Affected
    - Priority

- **Active Detailed Report by Primary System Affected** – This is a detailed report. Uses the ‘Active Qry by Sys Aff’ change request query and the ‘Active Detailed

Report Format by SA' change request report format to display the change requests. The user is prompted to choose Prod and/or Dev environment CRs for the report. Only active (not in a Closed state) CR's are returned. Sort order is by:
  - Environment
  - Primary System Affected
  - Planned Implementation Date
  - Priority

- **Active Summary Report by Planned Implementation Date** – Displays the ID, Data Center Reference Number, Title, Primary System Affected, Other Systems Affected, State, Priority, Requester Contact Info, Data Center POC, Date Submitted, Requested Implementation Date, and Planned Implementation Date for all Prod and/or Dev active (not closed) change requests. Before the report is displayed, the user will be prompted to select if they want to see Prod and/or Dev environment change requests. Uses the 'Active Qry by Plan Imp Date' change request query and the 'Env Summary Report Format' change request report format to display the change requests. Sort order is by:
  - Environment (the report is also grouped by Environment)
  - Planned Implementation Date
  - Primary System Affected
  - Priority

- **Active Summary Report by Primary System Affected** – Exact same report as the 'Active Summary Report by Planned Implementation Date' except for the sort order. The sort order for this report is:
  - Environment (the report is also grouped by Environment)
  - Primary System Affected
  - Planned Implementation Date
  - Priority

- **All Records Summary Report** – Displays the ID, Reference Number, Title, Environment, Primary System Affected, Other Systems Affected, State, Priority, Requester Contact Info, Data Center POC, Date Submitted, Requested Implementation Date, and Planned Implementation Date for all change requests. Uses the 'Summary Report' change request query and the 'Summary Report Format 2' change request report format to display a row of information for each change request in the database. Sort order is by
  - Environment
  - Primary System Affected
  - Requested Implementation Date

- **Comprehensive Primary System Affected Detailed Report** – This is a detailed report. Uses the 'Comprehensive Primary System(s) Query' change request query and the 'Comprehensive Primary System Affected Detailed RF' change request report format to display the change requests. The user is prompted to select the Environment(s) and the Primary System(s) Affected they wish to include in the report. All CR's matching the user's inputs will be returned (including Closed CR's). The sort order for this report is:
    - Primary System Affected
    - Environment
    - Planned Implementation Date
    - Priority

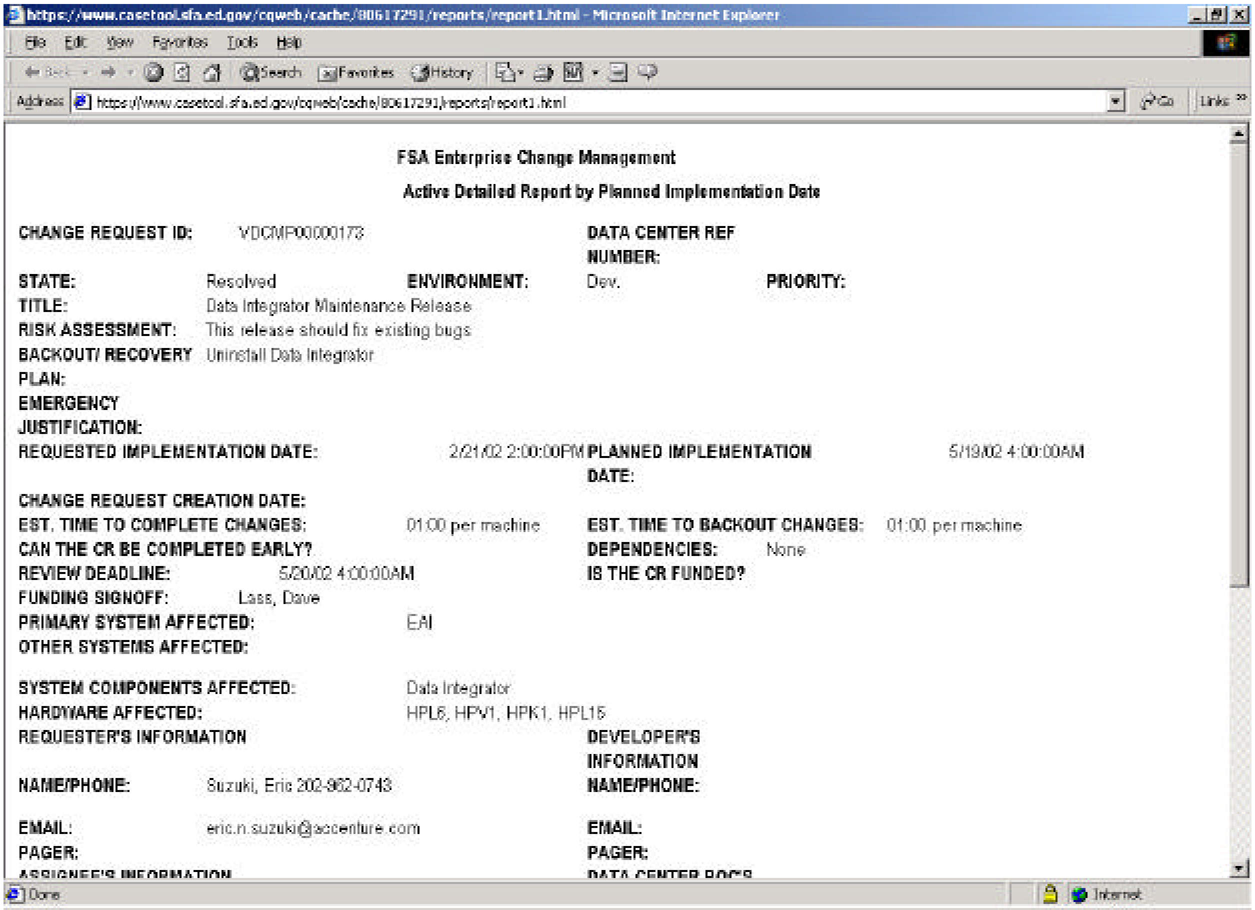
- **Comprehensive Primary System Affected Summary Report** – Displays the ID, Data Center Reference Number, Title, Primary Systems Affected, Other Systems Affected, State, Priority, Requester Contact Info, Data Center POC, Date Submitted, Requested Implementation Date, and Planned Implementation Date. Uses the 'Comprehensive Primary System(s) Query' change request query and the 'Comprehensive Primary System Summary Report Format2' change request report format to display the change requests. The user is prompted to select the Environment(s) and the Primary System(s) Affected they wish to include in the report. All CR's matching the user's inputs will be returned (including Closed CR's). The sort order is the same as the 'Comprehensive Primary System Affected Detailed Report'. The report is grouped by the Primary System Affected and the Environment.

- **Comprehensive System(s) Instance Detailed Report** – This is a detailed report. Uses the 'Comprehensive System(s) Query' change request query and the 'Comprehensive System(s) Detailed RF' change request report format to display the change requests. The user is prompted to select the Primary System(s) Affected and up to five other Systems Affected fields to search on for inclusion in the report. All CR's matching the user's inputs will be returned (including Closed CR's). For example, if the user wants to return all records that affect EAI, they should check 'EAI' on each of the six screen prompts AND check the 'All Systems' option on each of the six prompts. The sort order for this report is:
    - Primary System Affected
    - Environment
    - Planned Implementation Date
    - Priority

- **Comprehensive System(s) Instance Summary Report** – Displays the ID, Data Center Reference Number, Title, Primary System Affected, Other Systems Affected, State, Priority, Requester Contact Info, Data Center POC, Date Submitted, Requested Implementation Date, and Planned Implementation Date. Uses the 'Comprehensive System(s) Query' change request query and the 'Comprehensive System Summary Report Format' change request report format to display the change requests. The user is prompted to select the Primary System(s) Affected and up to five other Systems Affected fields to search on for inclusion in the report. All CR's matching the user's inputs will be returned (including Closed CR's). For example, if the user wants to return all records that affect EAI, they should check 'EAI' on each of the six screen prompts AND check the 'All Systems' option on each of the six prompts. The sort order for this report is the same as the 'Comprehensive System(s) Instance Detailed Report'. The report is grouped by Environment.

- **Individual Detailed Change Request Report** – This is a detailed report (see the list of fields above). Uses the 'Select ID' change request query and the 'Detailed Change Request Report Format' change request report format to display an individual change requests. Before the report is displayed, the user will be prompted to enter a change request ID. They can enter the exact ID of part of it.

- **Summary Report by Requested Implementation Date Range** – Displays the ID, Data Center Reference Number, Title, Primary System Affected, Other Systems Affected, State, Priority, Requester Contact Info, Data Center POC, Dated Submitted, Requested Implementation Date, and Planned Implementation Date and is grouped by Environment. Uses the 'Summary Query by Date Range' change request query and the 'Summary Report Format by Date Range' change request report format. The user is prompted to select the Environment(s) and State(s) they want included in the report, as well as a Requested Implementation Date date range for the report. The date range can be for a given date, before a given date, after a given date, or between certain dates. The sort order for this report is:
    - Environment
    - Primary System Affected
    - Requested Implementation Date
    - Priority



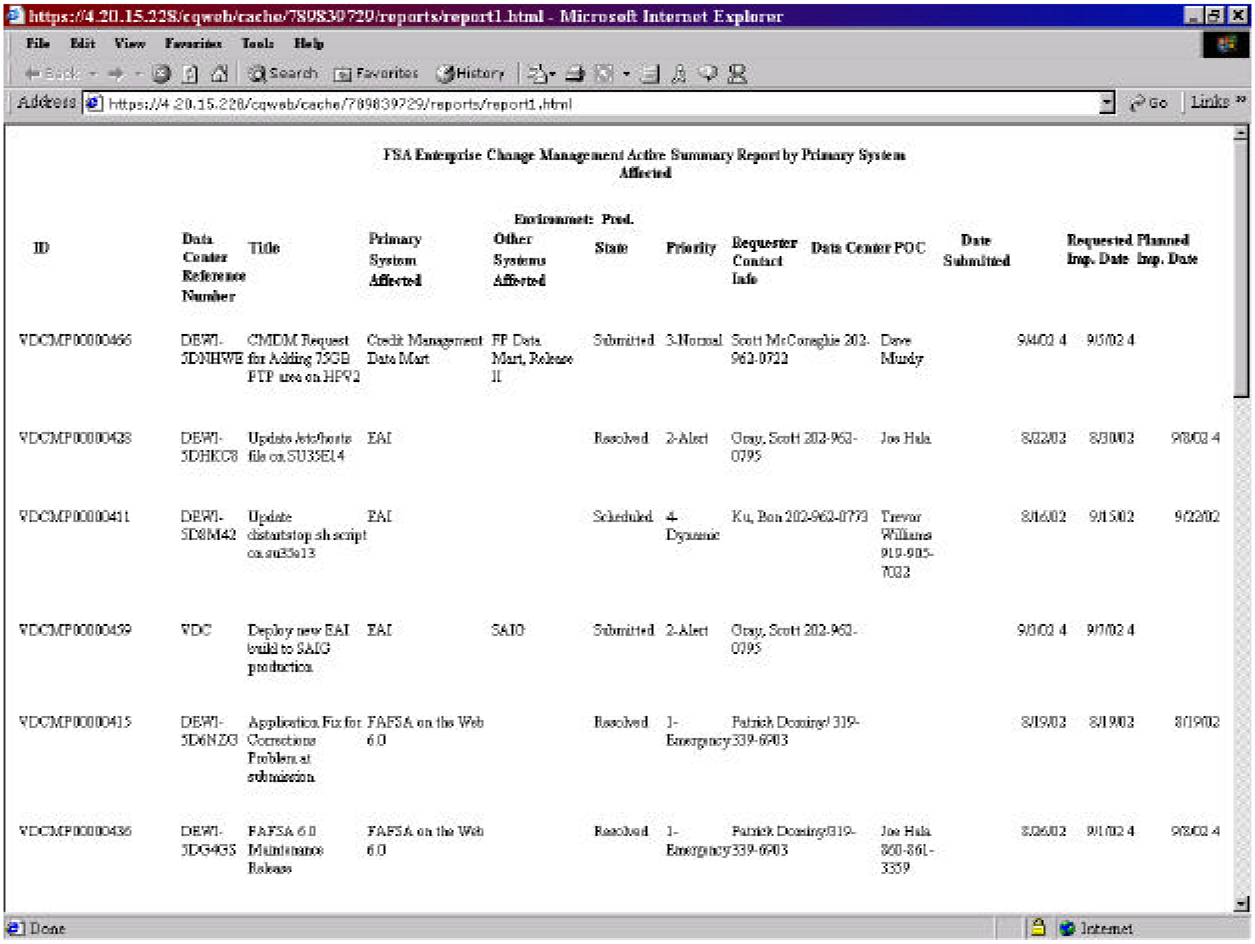
https://www.casetool.sfa.ed.gov/cqweb/cache/80617291/reports/report1.html - Microsoft Internet Explorer

FSA Enterprise Change Management

Active Detailed Report by Planned Implementation Date

CHANGE REQUEST ID: VDCMP00000173
DATA CENTER REF NUMBER:
STATE: Resolved
ENVIRONMENT: Dev.
PRIORITY:
TITLE: Data Integrator Maintenance Release
RISK ASSESSMENT: This release should fix existing bugs
BACKOUT/ RECOVERY PLAN: Uninstall Data Integrator
EMERGENCY JUSTIFICATION:
REQUESTED IMPLEMENTATION DATE: 2/21/02 2:00:00PM
PLANNED IMPLEMENTATION DATE: 5/19/02 4:00:00AM
CHANGE REQUEST CREATION DATE:
EST. TIME TO COMPLETE CHANGES: 01:00 per machine
EST. TIME TO BACKOUT CHANGES: 01:00 per machine
CAN THE CR BE COMPLETED EARLY?
DEPENDENCIES: None
REVIEW DEADLINE: 5/20/02 4:00:00AM
IS THE CR FUNDED?
FUNDING SIGNOFF: Lass, Dave
PRIMARY SYSTEM AFFECTED: EAI
OTHER SYSTEMS AFFECTED:
SYSTEM COMPONENTS AFFECTED: Data Integrator
HARDWARE AFFECTED: HPL6, HPV1, HPK1, HPL15
REQUESTER'S INFORMATION
DEVELOPER'S INFORMATION
NAME/PHONE: Suzuki, Eric 202-962-0743
NAME/PHONE:
EMAIL: eric.n.suzuki@accenture.com
EMAIL:
PAGER:
PAGER:

An example screen shot is displayed above of what a detailed report would look like on the web client.


https://4.20.15.228/cqweb/cache/789839729/reports/report1.html - Microsoft Internet Explorer

FSA Enterprise Change Management Active Summary Report by Primary System Affected

Environment: Prod.

ID	Data Center Reference Number	Title	Primary System Affected	Other Systems Affected	State	Priority	Requester Contact Info	Data Center POC	Date Submitted	Requested Imp. Date	Planned Imp. Date
VDCMP00000466	DEWI-5DNHWE	CMDM Request for Adding 73GB FTP area on HPV2	Credit Management Data Mart	FP Data Mart, Release II	Submitted	3-Normal	Scott McConaghie 202-962-0722	Dave Mundy	9/4/02 4	9/5/02 4	
VDCMP00000428	DEWI-5DHKC8	Update /etc/hosts file on SU35E14	EAI		Resolved	2-Alert	Gray, Scott 202-962-0795	Joe Hala	8/22/02	8/30/02	9/8/02 4
VDCMP00000411	DEWI-5D8M42	Update cdstartstop.sh script on su35e13	EAI		Scheduled	4-Dynamic	Ku, Bon 202-962-0773	Trevor Williams 919-905-7032	8/16/02	9/15/02	9/22/02
VDCMP00000459	VDC	Deploy new EAI build to SAIG production	EAI	SAIG	Submitted	2-Alert	Gray, Scott 202-962-0795		9/3/02 4	9/7/02 4	
VDCMP00000415	DEWI-5D6NZG	Application Fix for Corrections Problem at submission	FAFSA on the Web 6.0		Resolved	1-Emergency	Patrick Dorning/ 319-339-6903		8/19/02	8/19/02	8/19/02
VDCMP00000436	DEWI-5DG4G5	FAFSA 6.0 Maintenance Release	FAFSA on the Web 6.0		Resolved	1-Emergency	Patrick Dorning/319-339-6903	Joe Hala 860-861-3359	8/26/02	9/1/02 4	9/8/02 4

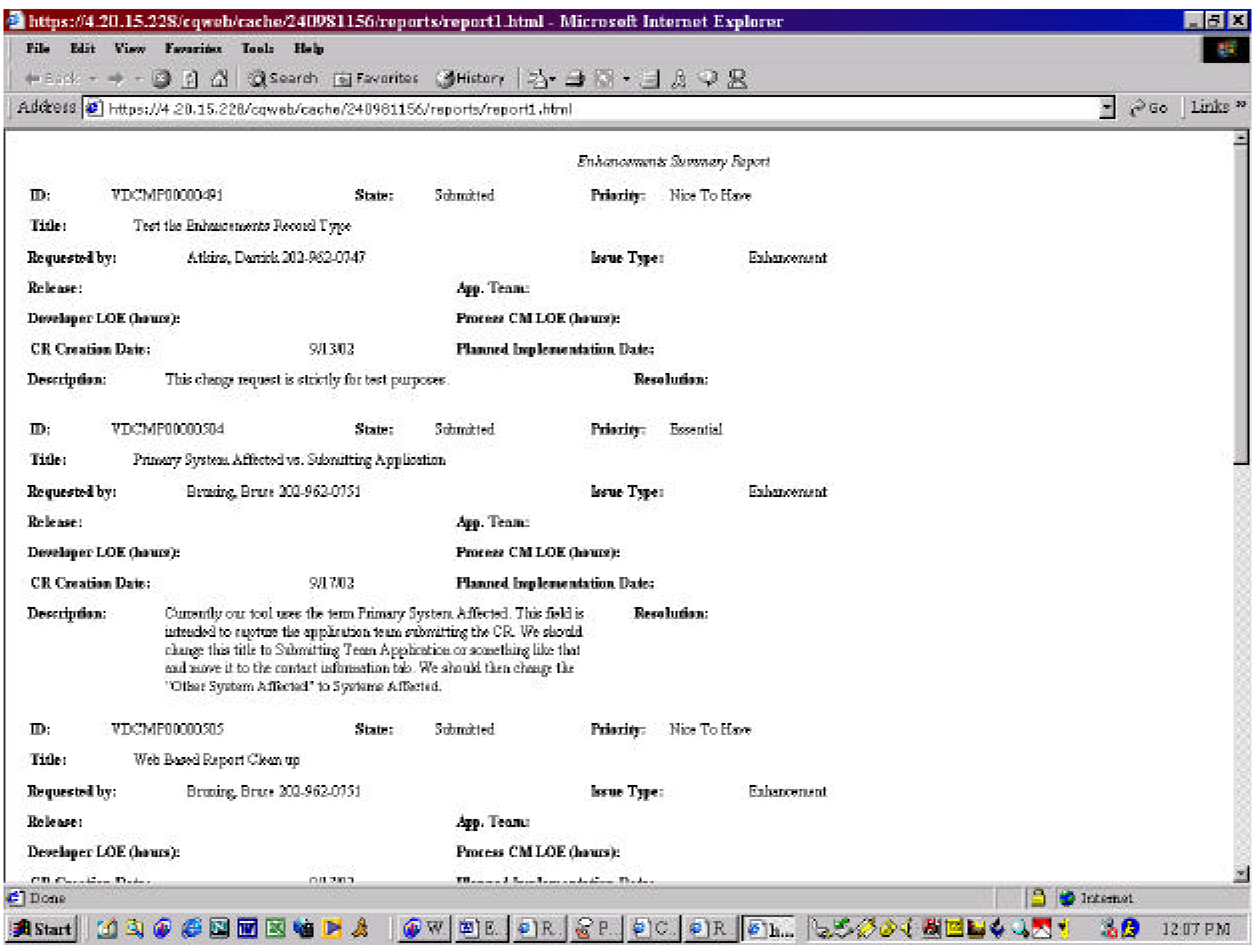
An example screen shot is displayed above of what a summary report would look like from the web client.

**Note: If an existing report format does not meet the need of a user, the user will need to contact the Enterprise Change Management schema administrator to create a new report format.

7.1.2 Enhancements Report

Listed below are the existing enhancement reports available to users. To run an issue report, select a predefined report in the 'Issue Reports' folder within the 'Public Queries -> Reports' folder.

- **Enhancements Summary Report** – Displays the ID, State, Title, Priority, Release, Developer LOE, Process CM LOE, CR Creation Date, Planned Implementation Date, Requested Implementation Date, Description and Resolution fields for the selected state(s). Uses the 'All Enhancements' query and 'Enhancements Report Format' report format to display a row of information for each enhancement in the database.

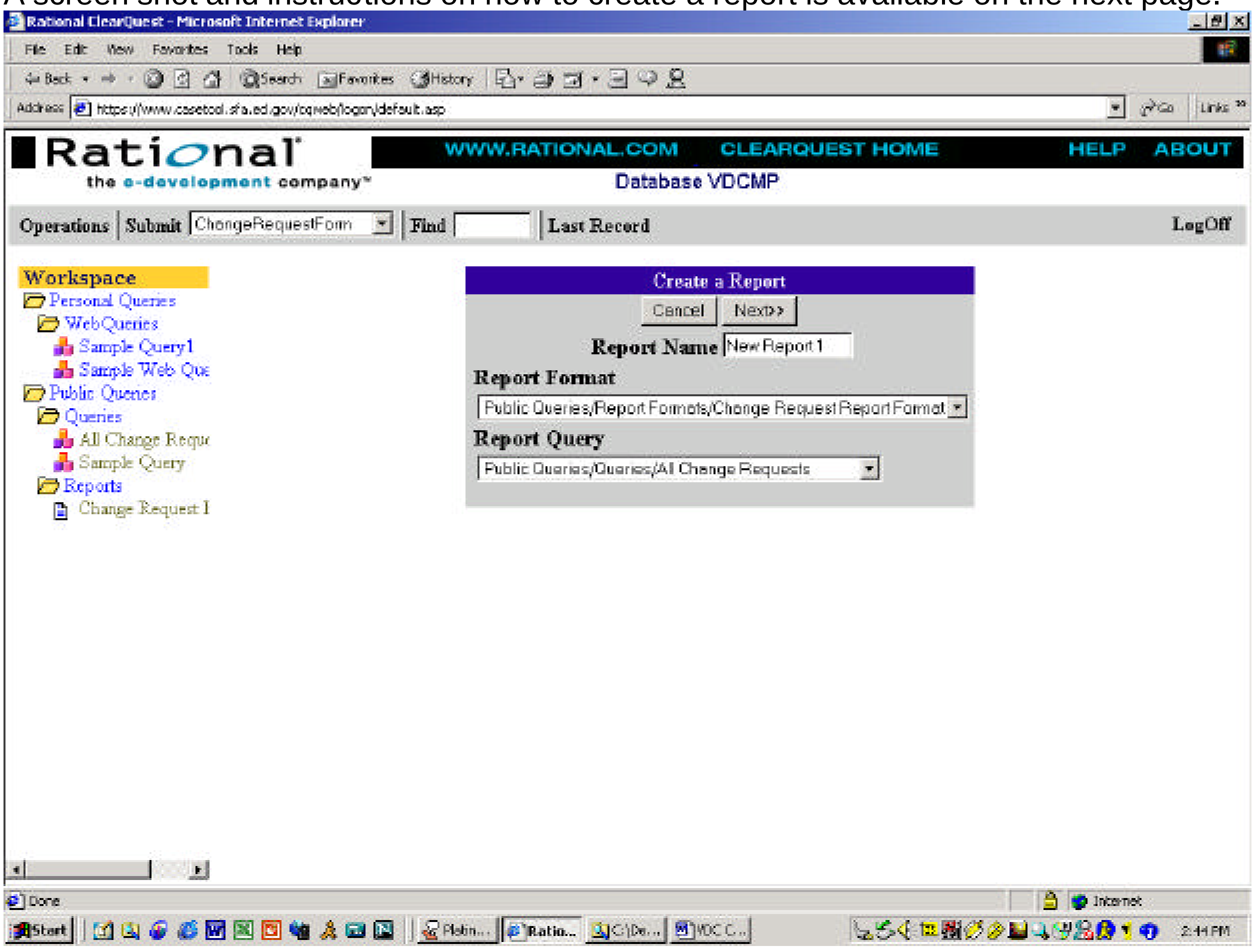


The screen shot above is an example of the Enhancements Summary Report.

7.2 Creating Reports

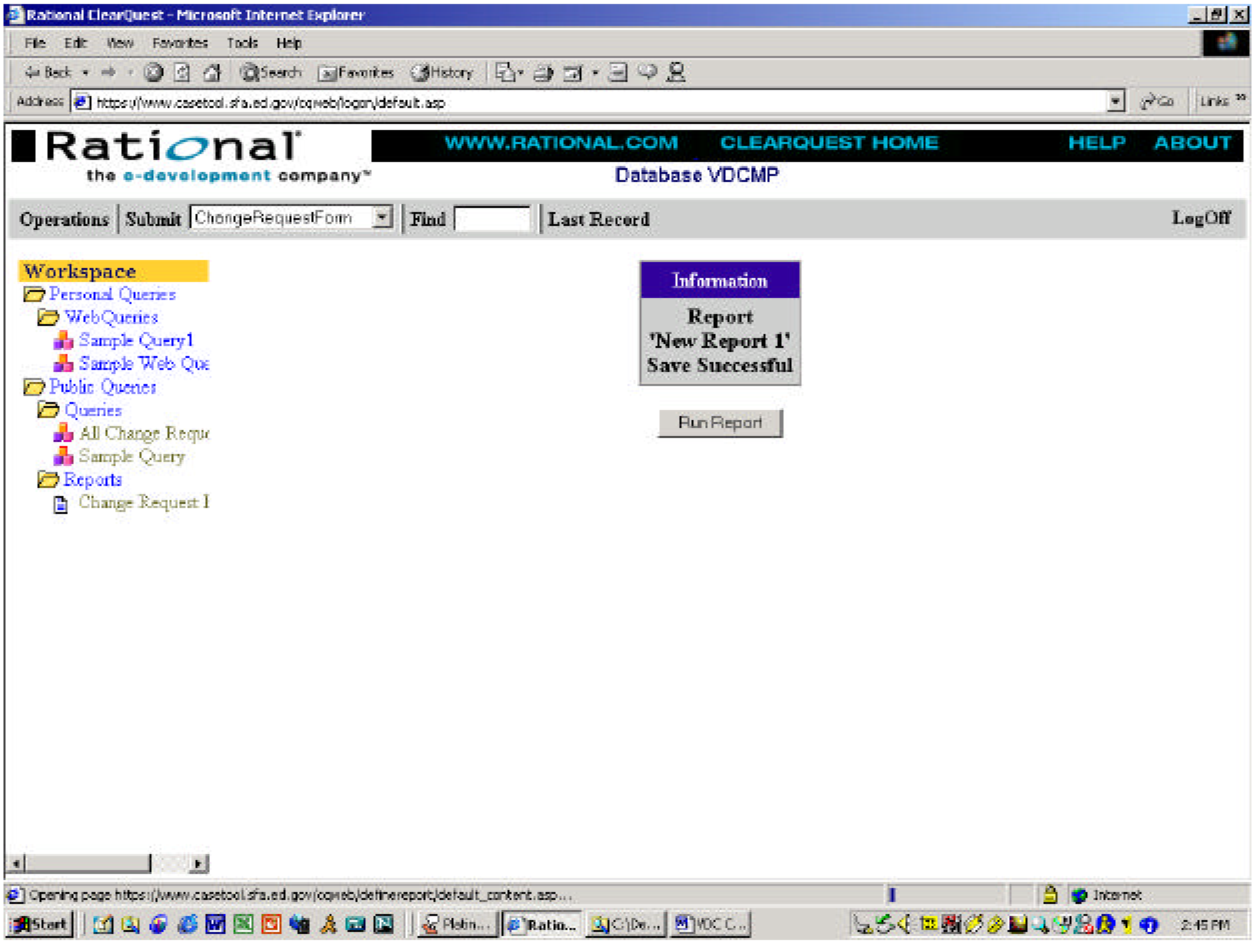
ClearQuest allows users to create new reports from the web client. A report is created by selecting an existing report format (the look and feel of the report, as well as fields to display) and matching it up with an existing query (the records to pull from the database). The report format will need to have been created using the desktop client and Crystal Reports. Report formats cannot be created from the web client. The report will be saved to the Personal Queries folder. When the report is run from that point on, it will pull the data accurate for that point in time. A report is not static and will update as the result set for a certain query changes.

A screen shot and instructions on how to create a report is available on the next page.



To create a report, the user must select ‘Create a Report’ in the ‘Operations’ menu. Once this is done, the page above is displayed. The user can cancel this action or enter a report name, select the report format, and select the report query. When the required information is selected, the user must click the ‘Next’ button.

** Note: Report formats can only be created from the desktop client. Contact your schema administrator if you need a new report format. The current available report formats are listed in Section 6.4.



If the user clicks the Next button, the following page will display. The name of the report is displayed as well. The user now can click the 'Run Report' button. Once this is done, a report will be generated

** Note: The report is displayed based on your browser's settings. Alter the browser's font settings to change the font.

7.3 Modifying an Existing Report

Depending on how the user modifies an existing report, the process and screen shots will be very similar to section 5.3, “Modifying an Existing Query”.

To edit an existing report, the user must select ‘Edit a Report’ in the ‘Operations’ menu. Once this is done, the next page displayed will allow the user to edit a report, delete a report, or rename a report. Please refer to section 5.3.

7.4 Existing Report Formats

The following report formats are currently available to be used in report creation. A query and a report format are combined to produce a report. The query pulls the specific data while the report format specifies the look of the report. A report format can be used in one to many reports since the query defines the data used in the report.

Change Request Report Formats:

Detailed Reports will include the following fields: ID, Data Center Reference Number, State, Environment, Priority, Title, Risk Assessment, Backout/Recovery Plan, Emergency Justification, Requested Implementation Date, Planned Implementation Date, CR Creation Date, Estimated Time to Complete Changes, Estimated Time to Backout Changes, Can the CR be Completed Early?, Dependencies, Review Deadline, Is the CR Funded?, Funding Signoff, Primary System Affected, Other System(s) Affected, System Components Affected, Hardware Affected, Requester’s Information, Developer’s Information, Assignee’s Information, Data Center POC’s Information, Description, and Notes Log.

- **Active Detailed Report Format by PID** – detail report
- **Active Detailed Report Format by SA** – detail report
- **Active Summary Report Format by PID** – Displays the ID, Data Center Reference Number, Title, Primary System Affected, Other Systems Affected, State, Priority, Requester Contact Info, Data Center POC, Date Submitted, Requested Implementation Date, and Planned Implementation Date. It is grouped by Environment.
- **Active Summary Report Format by SA** – Displays the ID, Data Center Reference Number, Title, Primary System Affected, Other Systems Affected, State, Priority, Requester Contact Info, Data Center POC, Date Submitted, Requested Implementation Date, and Planned Implementation Date. It is grouped by Environment.

- **Comprehensive Primary System Affected Detailed RF** – detail report
- **Comprehensive Primary System Summary Report Format** – Displays the ID, Data Center Reference Number, Title, Primary Systems Affected, Other Systems Affected, State, Priority, Requester Contact Info, Data Center POC, Date Submitted, Requested Implementation Date, and Planned Implementation Date. It is grouped by the Primary System Affected and Environment.
- **Comprehensive System Summary Report Format** – Displays the ID, Data Center Reference Number, Title, Primary System Affected, Other Systems Affected, State, Priority, Requester Contact Info, Data Center POC, Date Submitted, Requested Implementation Date, and Planned Implementation Date. It is grouped by Environment.
- **Comprehensive System(s) Detailed RF** – detail report
- **Detailed Change Request Report Format** – detail report
- Summary Report Format – Displays the ID, Reference Number, Environment, Title, Primary System Affected, State, Priority, Requester Contact Info, Data Center POC, Requested Implementation Date, and Planned Implementation Date.
- **Summary Report Format by Date Range** – Displays the ID, Data Center Reference Number, Title, Primary System Affected, Other Systems Affected, State, Priority, Requester Contact Info, Data Center POC, Date Submitted, Requested Implementation Date, and Planned Implementation Date. It is grouped by Environment.

Enhancements Report Formats:

- **Enhancements Report Format** – Displays the Project, State, Title, Assignee, Due Date, Priority, and Description fields.

8. Email Rules

Email rules are based on events that trigger an email to be sent to a specific user, user group, or a field value. An email rule can be triggered by an action occurring, state transitions, fields changing, or any combination of the previous events. For example, the 'Propose' action could trigger an email rule or going from the 'Submitted' state to the 'Proposed' state could trigger an email rule. The event in both cases is similar, there are just different ways to specify how the email rule will be triggered.

Listed below are the current email rules for the ChangeRequestForm record type.

Email Rule Name	Event Trigger	User(s)/Group(s) Addressed	Fields Included
Approved for Scheduling	'Approved_for_ Scheduling' action	Requester Developer	Id Title GCARS_Ref_Number State Priority Systems_Affected Risk_Assessment Req_Imp_dt Planned_Imp_dt Review_Deadline CR_Funded Funding_Signoff Systems_Affected Systems_Affected2 Systems_Affected3 Systems_Affected4 Systems_Affected5 Systems_Affected6 System_Components Hardware_Affected Requester_Contact_Info Req_Email Developer_Contact_Info Dev_Email Assignee_Contact_Info App_Email POC_Contact_Info POC_Email Environment Description

Email Rule Name	Event Trigger	User(s)/Group(s) Addressed	Fields Included
			Notes Notes_Archive history
Change Implemented	'Implement' action	ECM Pilot group VDC SDM group Requester Developer System Affected groups (for all systems affected)	(same as 'Approved for Scheduling' email rule)
Close Rejected	'Close_Rejected' action	ECM Pilot group	(same as 'Approved for Scheduling' email rule)
Close Successfully	'Close_Successfully' action	ECM Pilot group Assignee	(same as 'Approved for Scheduling' email rule)
Disapprove	'Disapprove' action	ECM Pilot group VDC SDM group Requester Developer Data Center POC	(same as 'Approved for Scheduling' email rule)
Disapprove Funding	'Disapprove_ Funding' action	VDC SDM group Requester Developer Data Center POC System Affected groups (for all systems affected)	(same as 'Approved for Scheduling' email rule)
Failed CR from Resolved	From 'Resolved' state to 'Rejected' state	ECM Pilot group VDC SDM group Assignee Data Center POC System Affected groups (for all systems affected)	(same as 'Approved for Scheduling' email rule)
Failed CR from Scheduled	From 'Scheduled' state to 'Rejected' state	ECM Pilot group VDC SDM group Requester Developer System Affected groups (for all	(same as 'Approved for Scheduling' email rule)

Email Rule Name	Event Trigger	User(s)/Group(s) Addressed	Fields Included
		systems affected)	
Propose for Approval	'Propose' action	ECM Pilot group Requester Developer System Affected groups (for all systems affected)	(same as 'Approved for Scheduling' email rule) plus the Action_Required field
Reject as Invalid CR after Submission	From 'Submitted' state to 'Rejected' state	ECM Pilot group Requester Developer	(same as 'Approved for Scheduling' email rule)
Reject as Invalid CR from CCRB Review	From 'CCRB_Review' state to 'Rejected' state	ECM Pilot group Requester Developer System Affected groups (for all systems affected)	(same as 'Approved for Scheduling' email rule)
Reviewed to CCRB Review	'Review' action	ECM Pilot group Requester Developer System Affected groups (for all systems affected)	(same as 'Approved for Scheduling' email rule)
Scheduled	'Approve' action	ECM Pilot group	(same as 'Approved for Scheduling' email rule)
Send to FSA for Funding	'Request_Funding' action	ECM Pilot group VDC Contracts Requester Developer	(same as 'Approved for Scheduling' email rule)
Submission Notification	'Submit' action	ECM Pilot group VDC SDM group Data Center POC System Affected groups (for all systems affected)	(same as 'Approved for Scheduling' email rule) Description

Listed below are the current email rules for the Enhancements record type.

Email Rule Name	Event Trigger	User(s)/Group(s) Addressed	Fields Included
Enhancements Email Notification - Submitted	'Submitted' action	Developer	Id Title CR Creation Date State Release App. Team Priority Requester's Name/Phone Requester's Email Description Notes Notes Log

9. Proxy Server Settings

If accessing the Tool via the Internet, this section can be used to gain remote access to the tool.

This section discusses the required VDC proxy server settings in order to gain access to the ClearQuest web client. If you already are connected to the VDC, such as on the EDLAN, this is not necessary.

9.1 Internet Explorer

The following steps are required to set up the proxy server settings for Internet Explorer:

1. Open the Internet Explorer browser.
2. Select ‘Internet Options’ in the ‘Tools’ menu.
3. Click ‘LAN Settings’ on the ‘Connections’ tab.
4. In the ‘Proxy Server’ section, check the ‘Use a Proxy Server’ checkbox.
5. Enter nsmmfw02.cscoe.accenture.com in the ‘Address’ field.
6. Enter the proper port number in the ‘Port’ field. This may default to 80.
7. Check the ‘Bypass proxy server for local addresses’ checkbox.
8. Click ‘OK’ in the ‘Connections’ tab.
9. Click ‘OK’ in the ‘Internet Options’ tab.
10. Close the browser.

9.2 Netscape Navigator

The following steps are required to set up the proxy server settings for Netscape Navigator:

1. Open the Netscape Navigator browser.
2. Select ‘Preferences’ in the ‘Edit’ menu.
3. Under the ‘Category’ section, click the triangular symbol next to ‘Advanced’ to expand the selection.
4. Select ‘Proxies’.
5. In the ‘Proxies’ menu, click the ‘Manual Proxy Configuration’ radio button.
6. In the ‘HTTP Proxy’ field, enter nsmmfw02.cscoe.accenture.com and enter 80 as the value in the ‘Port’ field.
7. Click ‘OK’.
8. Close the browser.

10. Contact Us

If you have any questions or administrative needs, please contact:

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For problems accessing the web client not related to your user account, such as the page does not load, contact the Rational Tool Implementation Support Team at (202) 962-0757.